T&L Employee Self Service Created on Monday, March 01, 2010

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T&L Employee Self Service

T&L Employee Self Service

T&L Terminology

T&L Terminology

PHRST Delta Training v8.9

Time and Labor Terminology

Procedure

By the end of this topic, you will be able to:

- Understand new Time & Labor terminology

Approximate time to complete topic: 3 minutes

Step	Action
1.	The following frames introduce frequently used Time and Labor terms.
2.	Congratulations! You now know how to: - Understand new Time & Labor terminology End of Procedure.

Reporting Time

Reporting Time on the Timesheet

PHRST End User Training v8.9 Reporting Time on the Timesheet

Procedure

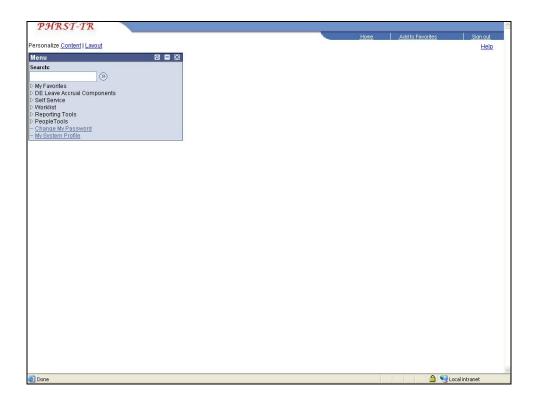


By the end of this topic, you will be able to:

- Navigate to the **Timesheet** page
- Enter time on the **Timesheet**
- View Sick and Annual Leave balance information

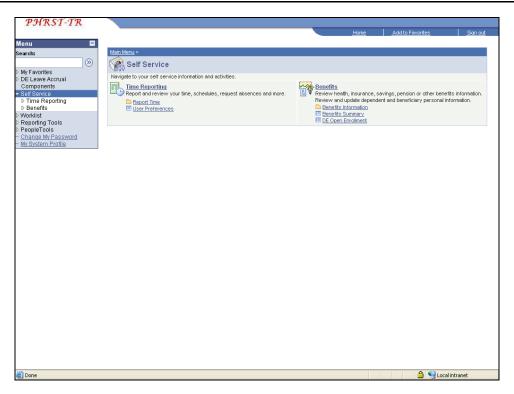
The objective of this topic is to understand how to enter time as a Self Service Time Reporter.

Approximate time to complete topic: 5 minutes



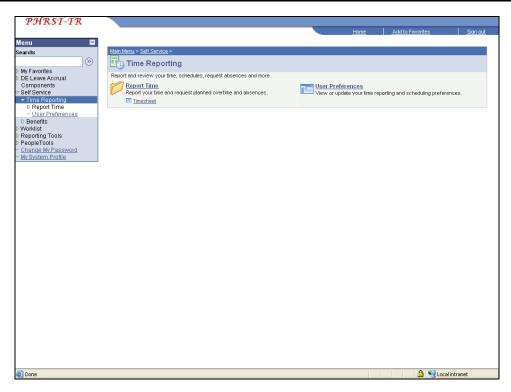
Step	Action
1.	Begin by navigating to the Timesheet page.
	Click the Self Service link. D Self Service





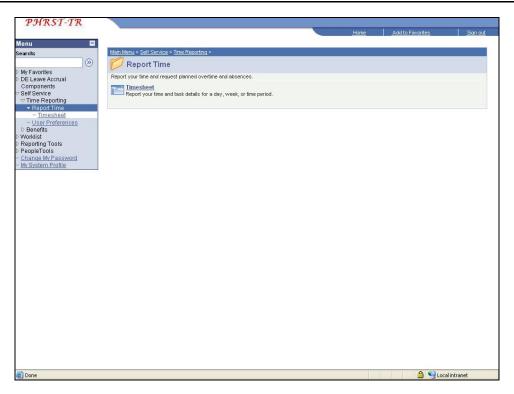
Step	Action
2.	Click the Time Reporting link.
	D Time Reporting





Step	Action
3.	Click the Report Time link.
	D Report Time





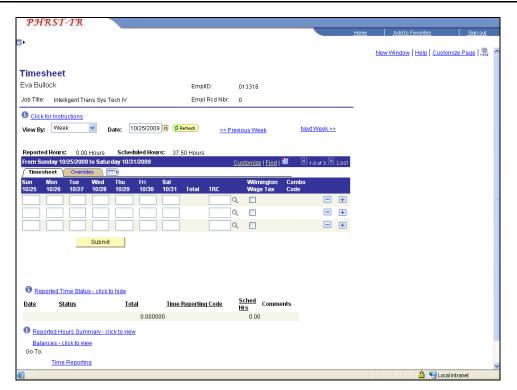
Step	Action
4.	Click the Timesheet link.
	Timesheet





Step	Action
5.	Click the Collapse Menu button.





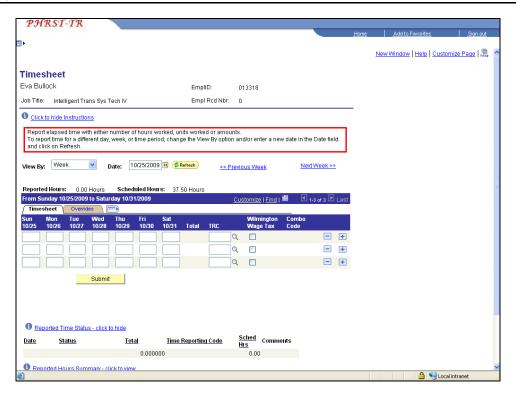
Step	Action
6.	Use the Timesheet page to review, enter and update time.





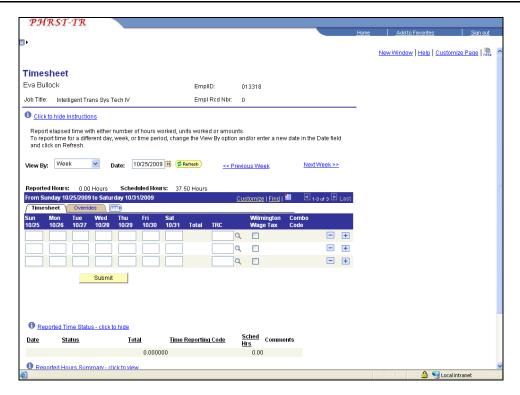
Step	Action
7.	Click the Click for Instructions link.
	Click for Instructions





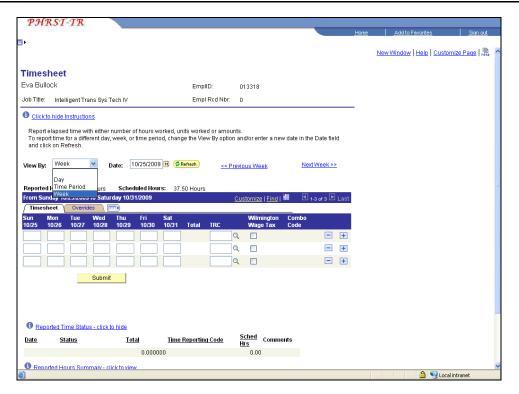
Step	Action
8.	After clicking the Click for Instructions link, the page displays a detailed
	description of the Timesheet page's functionality.





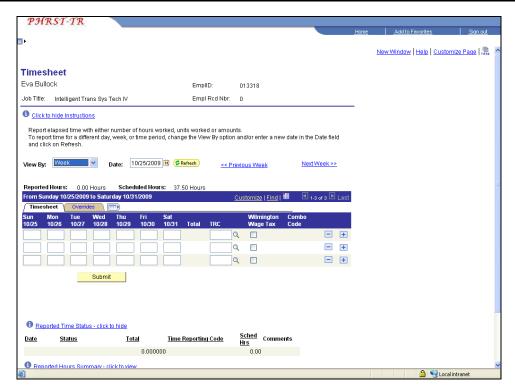
Step	Action
9.	The View By field selection indicates the period that will display on the Timesheet .
	Click the View By list.





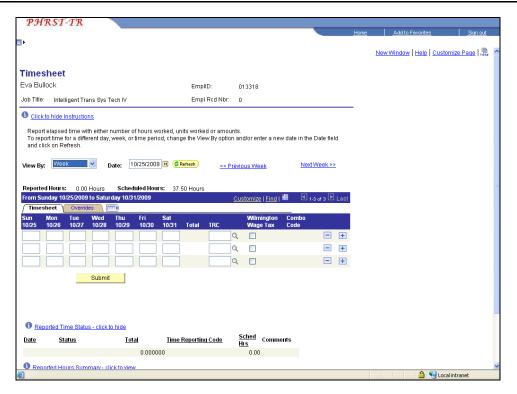
Step	Action
10.	The default for this field is Week . Available values for the View By field are Day , Time Period , and Week . Links will change based on the View By option that is selected.





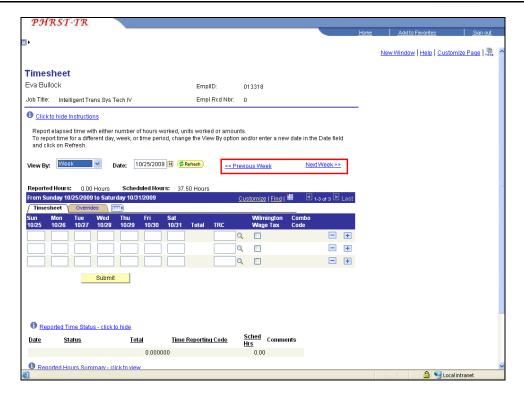
Step	Action
11.	The Date field defaults to Sunday (first day of week) of the current week; however, this date may be changed. The Date field should be changed to reflect the beginning of the pay period being reported.





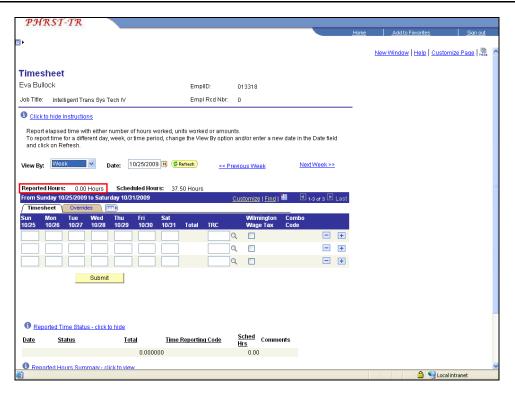
Step	Action
12.	Click the Refresh button to change the dates displayed on the Timesheet based on the date entered in the Date field.





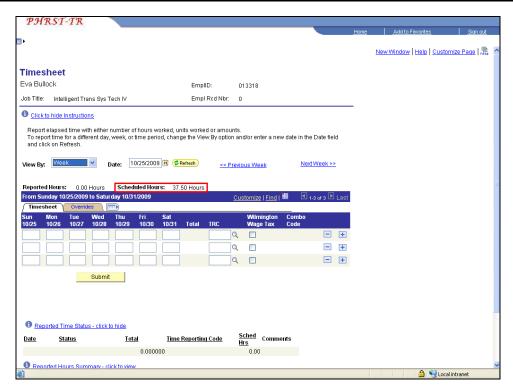
Step	Action
13.	Use the << Previous Week and Next Week>> links to view the previous or next
	time reporting periods.





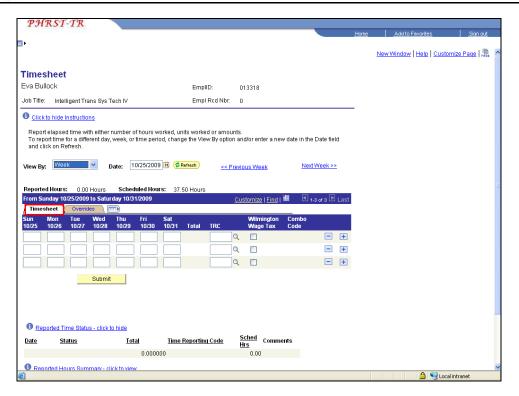
Step	Action
14.	The Reported Hours field displays the number of hours reported for the specified period on the Timesheet .
	This field displays 0.00 until the time has been submitted.





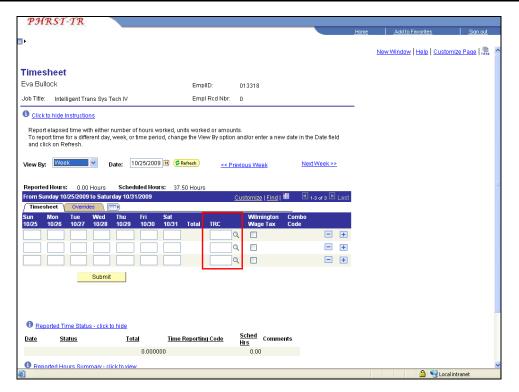
Step	Action
15.	The Scheduled Hours field displays the number of hours based on the work schedule.
	If no schedule exists, Scheduled Hours displays 0.00.





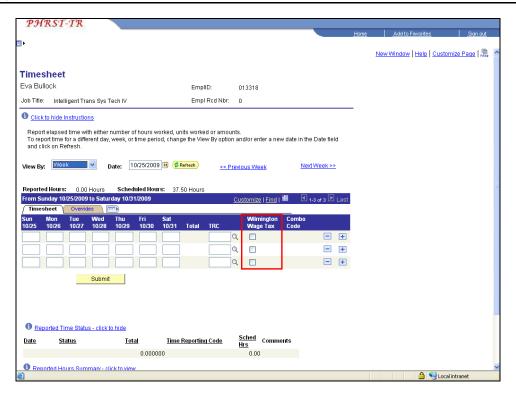
Step	Action
16.	Use the Timesheet tab to input the hours worked for the specified date as well as assigning the appropriate Time Reporting Code (TRC).
	Note: Exception Hourly employees with a Work Schedule only need to report exceptions to their schedule. If no exceptions to the Work Schedule exist no time entry is required.
	Note: Positive time reporters must enter all time worked on the Timesheet .





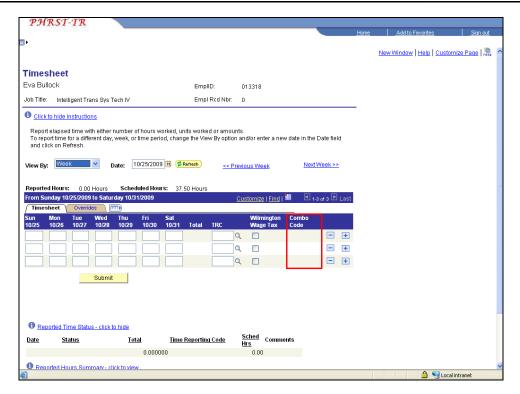
Step	Action
17.	Use TRCs to report time and leave. Enter TRCs directly in the field or use the lookup button to ensure valid TRCs are selected.
	Note: If a non-existent TRC is entered directly in the field an error message displays.





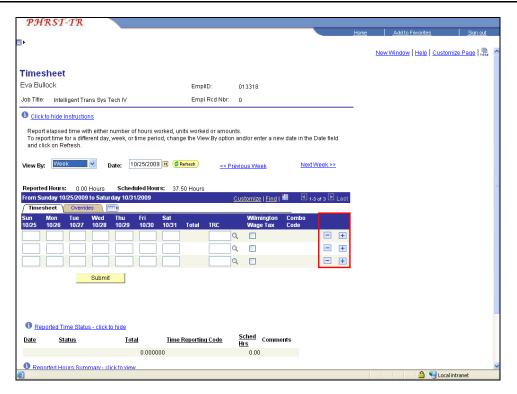
Step	Action
18.	The Wilmington Wage Tax checkbox flags the row's hours as being subject to Wilmington Wage Tax.
	Note: If you do not reside or regularly work within the City of Wilmington and are reporting occasional time worked within the City, contact your Timekeeper for the appropriate use of this checkbox.





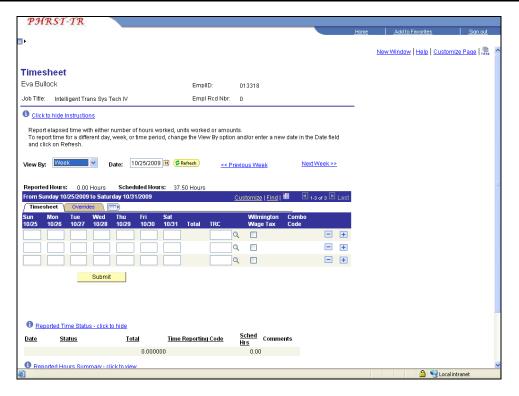
Step	Action
19.	If there is no override to funding, the Combo Code field is blank. If there is an override to funding, this field displays the Combo Code value.
	override to randing, and note displays the combo code value.





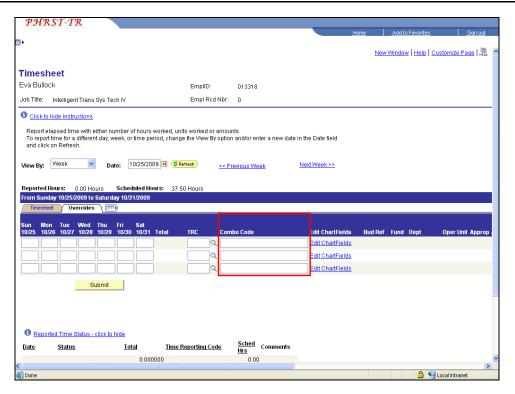
Step	Action
20.	When reporting time on the Timesheet , click the Plus (+) sign to add a row or the
	Minus (-) sign to delete a row.





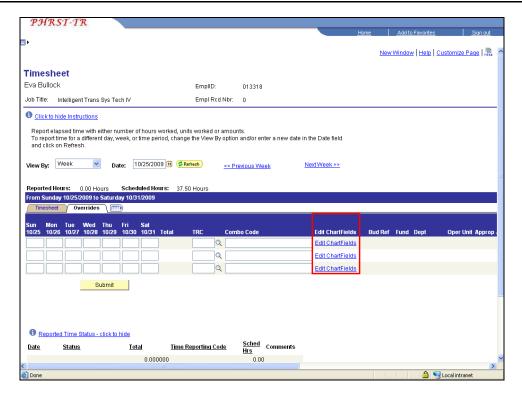
Step	Action
21.	Note: Typically, Self-Service users do not override Combo Codes.
	Use the Overrides tab to enter Combo Codes and/or edit ChartFields only if instructed by your Timekeeper.
	Click the Overrides tab.
	Overrides





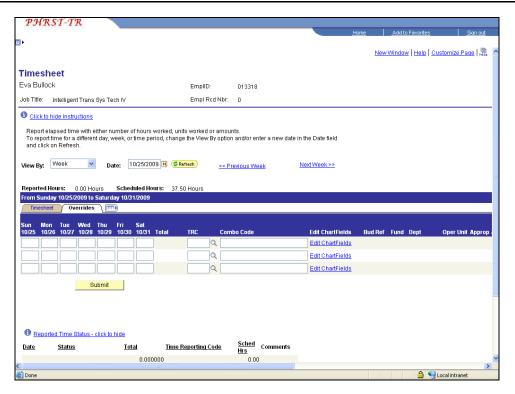
Step	Action
22.	If the Combo Code is known, enter it directly into the field. Note : PHRST displays an error message when an invalid Combo Code is entered. Reported Time transactions cannot be saved until the invalid Combo Code is corrected or deleted.





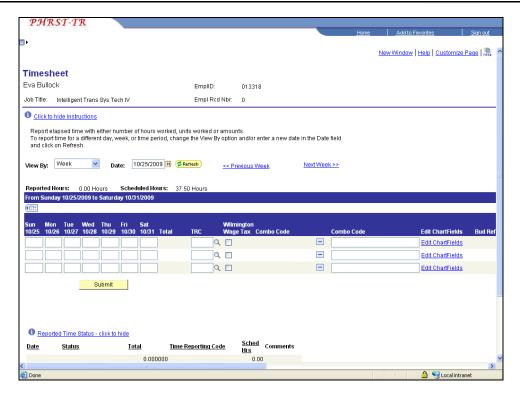
Step	Action
23.	To search for the appropriate Combo Code to override funding, click the Edit ChartFields link.
	Searching for Combo Codes is discussed in the Override and Append topic.





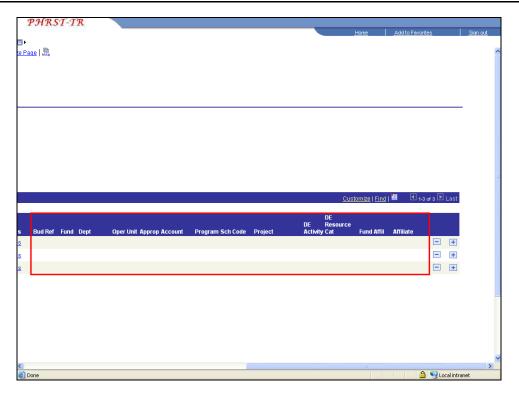
Step	Action
24.	The Show All Columns tab displays all the fields from the Timesheet and Overrides tabs. Click the Show all columns button.





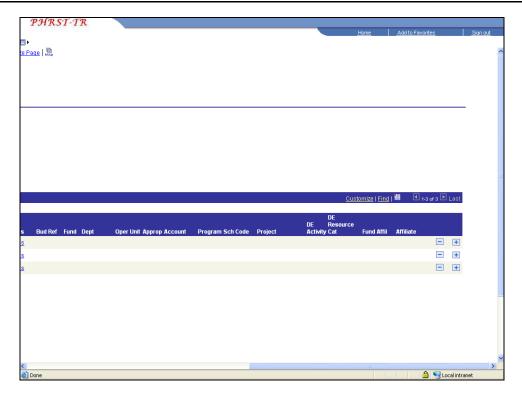
Step	Action
25.	View the additional columns on this page using the Horizontal Scrollbar .
	Click the scrollbar.





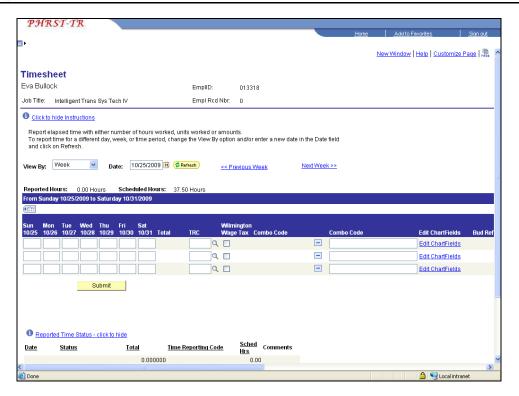
Step	Action
26.	View the additional columns that display.





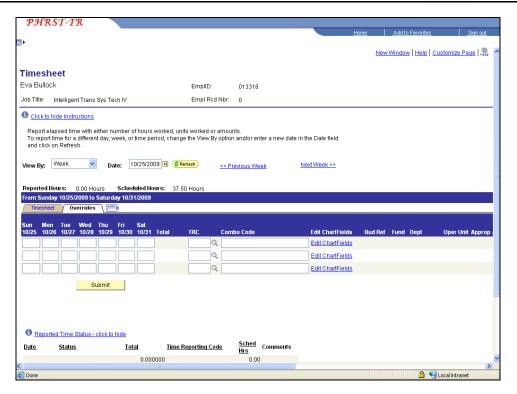
Step	Action
27.	Click the scrollbar.





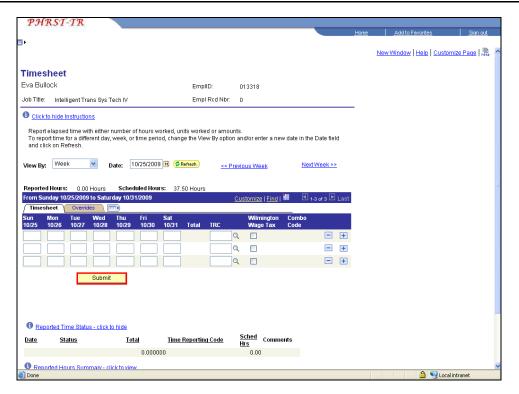
Step	Action
28.	Click the Show tabs button.





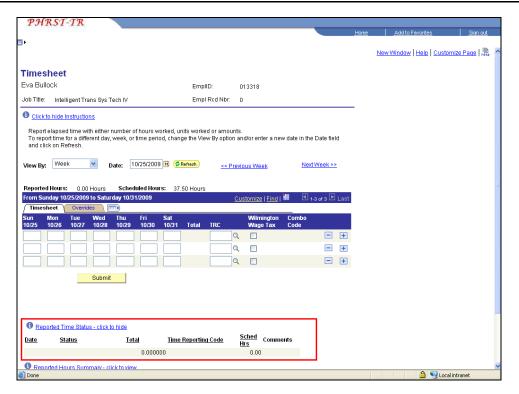
Step	Action
29.	Click the Timesheet tab.
	Timesheet





Step	Action
30.	The Submit button saves the Reported Time for processing.





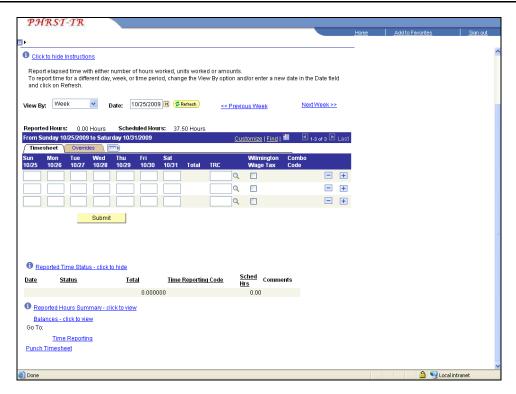
Step	Action
31.	After clicking the Submit button. the Reported Time Status section displays the Reported Time by date with a status of Submitted.





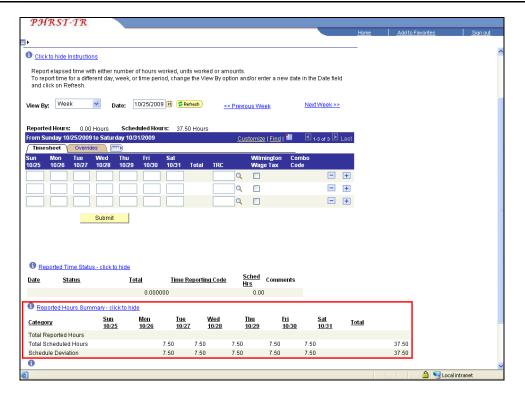
Step	Action
32.	Click the scrollbar.





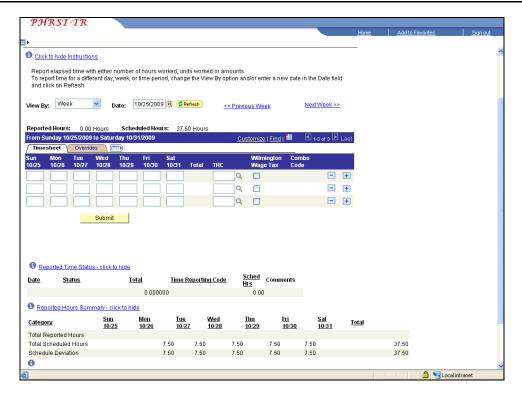
Step	Action
33.	The Reported Hours Summary section displays a summation of the hours reported.
	Click the Reported Hours Summary - click to view link. Reported Hours Summary - click to view





Step	Action
34.	The Reported Hours Summary section displays categories of Total REG and Total Overtime only when reported.
	Values are displayed in Total Reported Hours when Hours are reported on the Timesheet.
	Values are displayed in Total Scheduled Hours if the employee is assigned a Schedule.
	Values are displayed in Schedule Deviations when there is a difference between the Reported Hours and the Scheduled Hours.
	Press [Enter].





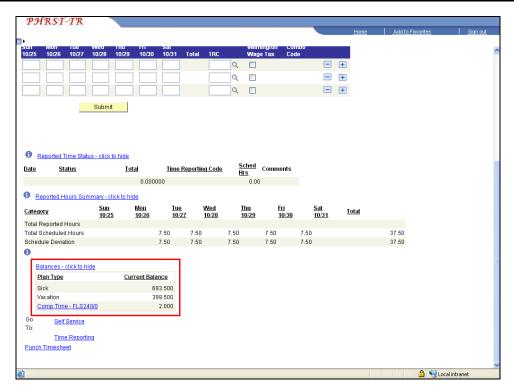
Step	Action
35.	To view the Balances section use the Vertical Scrollbar .
	Click the scrollbar.





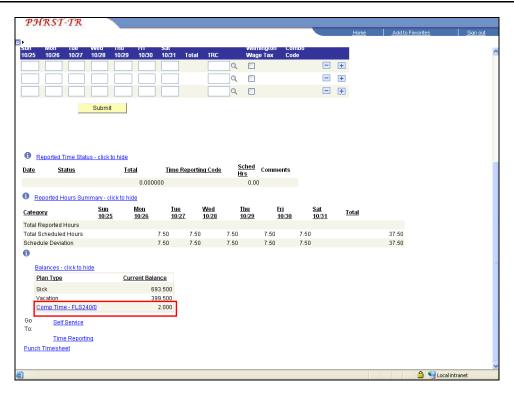
Step	Action
36.	Click the Balances - click to view link.
	Balances - click to view





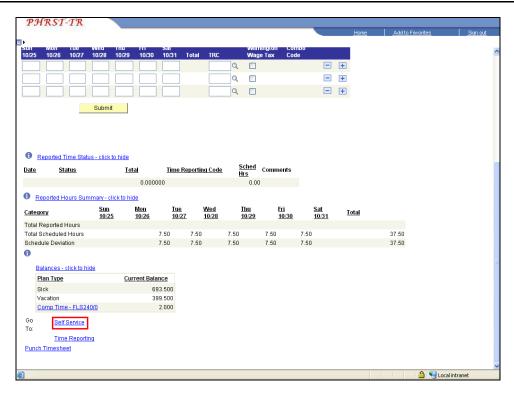
Step	Action
37.	The Balances section displays Sick, Vacation, and Comp Time Balances.
	The Balances section only displays balances for Plans in which the employee is enrolled.





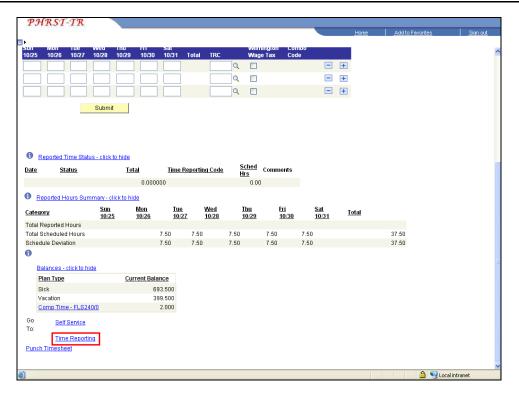
Step	Action
38.	The Comp Time balances change based on the View By date entered on the Timesheet. Comp Time balances may change with refreshes to the View By date.





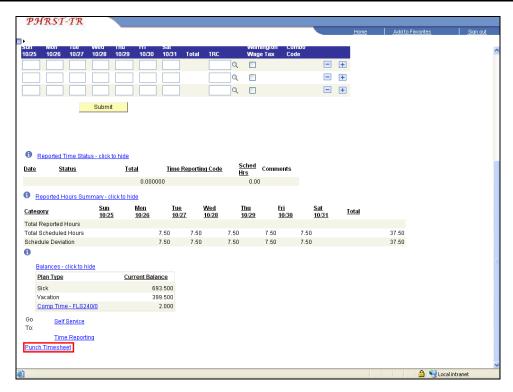
Step	Action
39.	Clicking the Self Service link returns to the Main Menu.





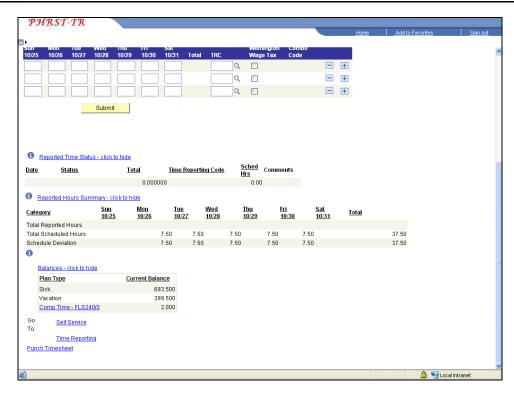
Step	Action
40.	When clicked, the Time Reporting link displays the Time Reporting Main Menu
	page.





Step	Action
41.	The Punch Timesheet link is not in use by the State of Delaware.





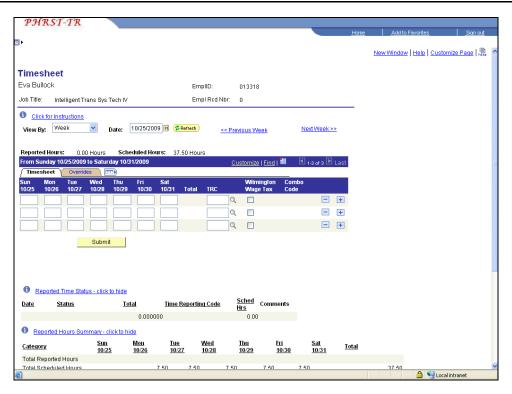
Step	Action
42.	Click the scrollbar.





Step	Action
43.	Some employees have Work Schedules associated with their time reporting. If a day has scheduled time, but no time is reported on the Timesheet , the scheduled time is paid.
	If there are no exceptions for the week, there is no need to enter any time.
	If time is manually entered on the timesheet for a scheduled day, only the hours entered are paid. Therefore, when entering Exceptions, all Scheduled Hours for that day must be accounted for. For example, if you are scheduled to work 8 hours and you worked 5 hours and took 3 hours of leave, you must also enter 3 hours of ALT and 5 hours of REG.
	Check with your Timekeeper on how to enter time on Pay Periods that include a State Holiday.
44.	In this example, Eva Bullock worked her normal hours (7.5 REG) with the exception of Tuesday where she worked (6.5 REG) and took (1.0 ALT).
	Let's enter Eva Bullock's time for the week of October 25th.





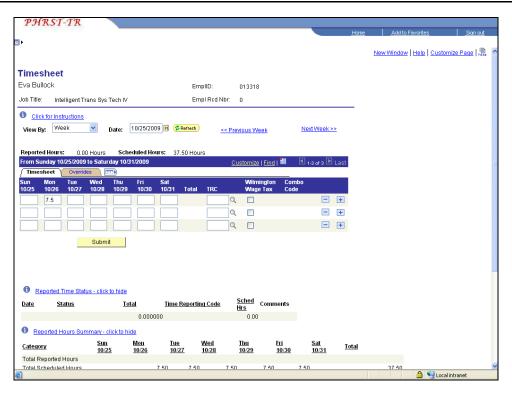
Step	Action
45.	Click in the Mon 10/26 field.





Step	Action
46.	Enter the desired information into the Mon 10/26 field. Enter "7.5".





Step	Action
47.	Click in the Tue 10/27 field.





Step	Action
48.	Enter the desired information into the Tue 10/27 field. Enter "6.5".





Step	Action
49.	Click in the Wed 10/28 field.





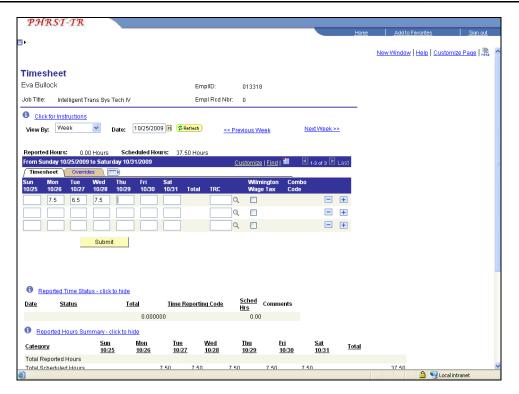
Step	Action
50.	Enter the desired information into the Wed 10/28 field. Enter "7.5".





Step	Action
51.	Click in the Thu 10/29 field.





Step	Action
52.	Enter the desired information into the Thu 10/29 field. Enter " 7.5 ".





Step	Action
53.	Click in the Fri 10/30 field.





Step	Action
54.	Enter the desired information into the Fri 10/30 field. Enter " 7.5 ".





Step	Action
55.	Click in the TRC field.





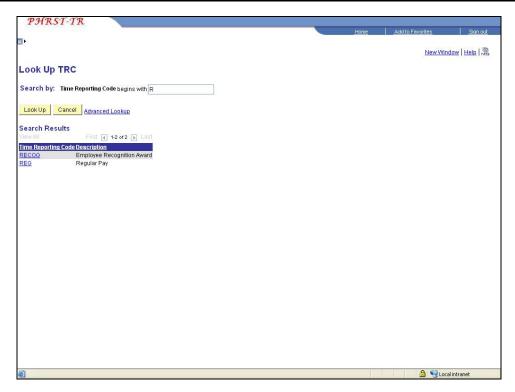
Step	Action
56.	Enter the desired information into the TRC field. Enter " R ".





Step	Action
57.	Click the Look up TRC button.
	<u> </u>





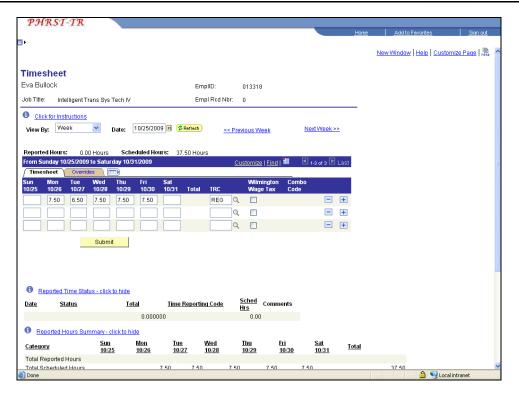
Step	Action
58.	Click the REG link.





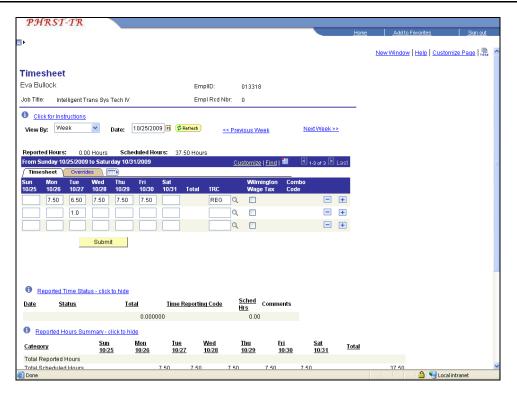
Step	Action
59.	Click in the Tue 10/27 field.





Step	Action
60.	Enter the desired information into the Tue 10/27 field. Enter " 1.0 ".





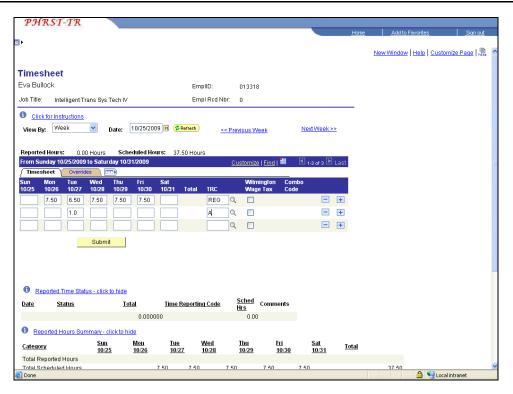
Step	Action
61.	Click in the TRC field.





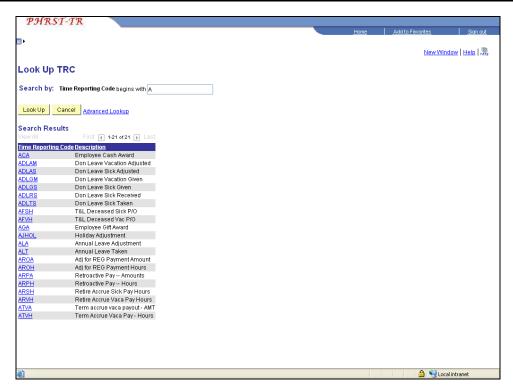
Step	Action
62.	Enter the desired information into the TRC field. Enter "A".





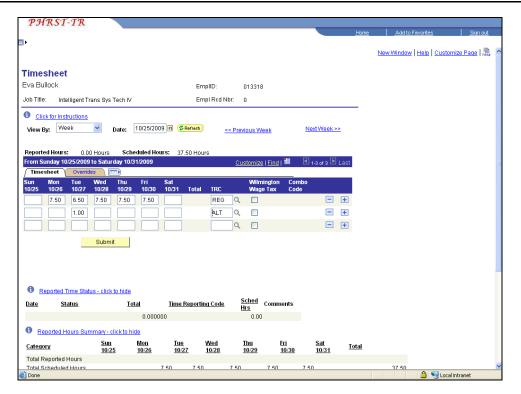
Step	Action
63.	Click the Look up TRC button.





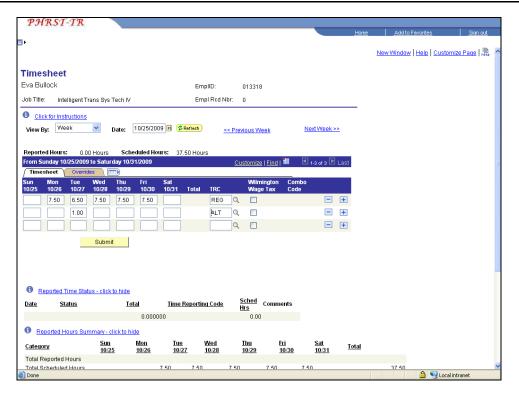
Step	Action
64.	Click the ALT link.





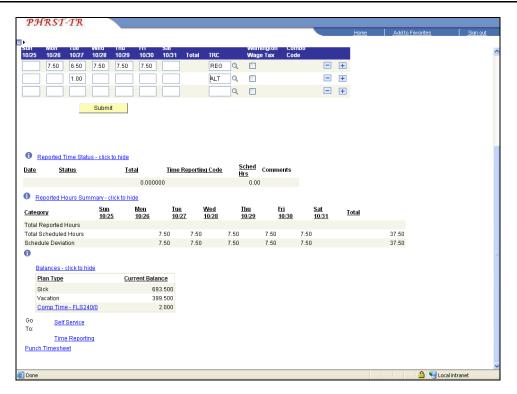
Step	Action
65.	Prior to submitting the Timesheet , view this employee's current leave balance information.





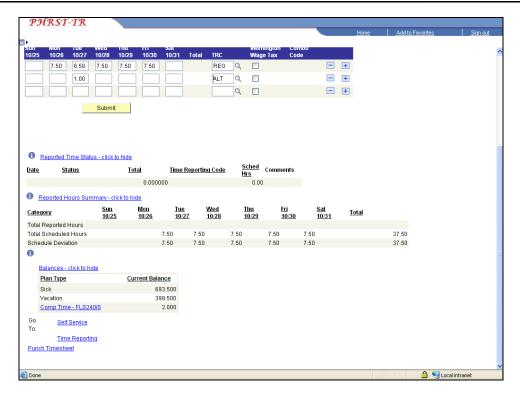
Step	Action
66.	Click the scrollbar.





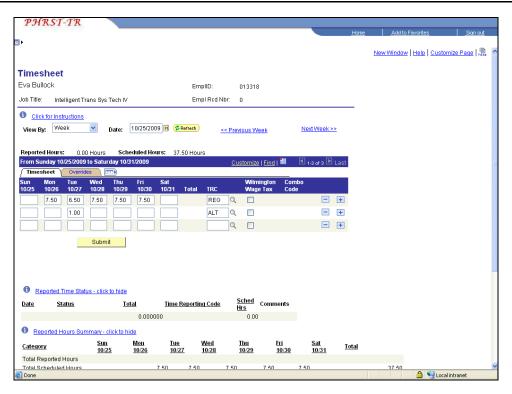
Step	Action
67.	View this employee's current Sick and Vacation leave balance information.
	Note the Sick leave balance is 693.500 and the Vacation leave balance is 399.500.





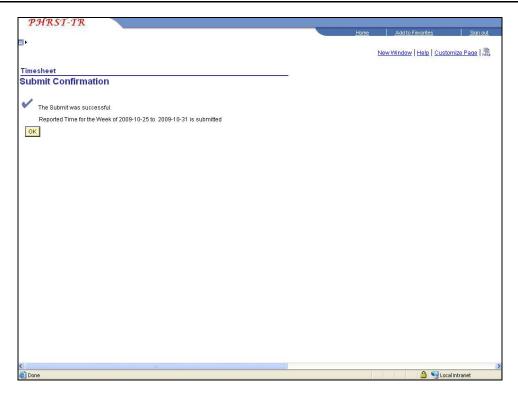
Step	Action
68.	Click the scrollbar.





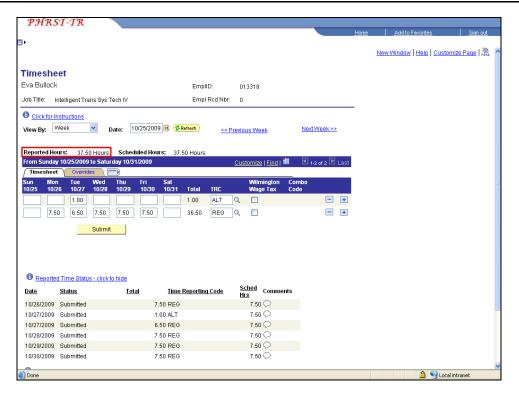
Step	Action
69.	Submit the Timesheet for processing.
	Click the Submit button. Submit





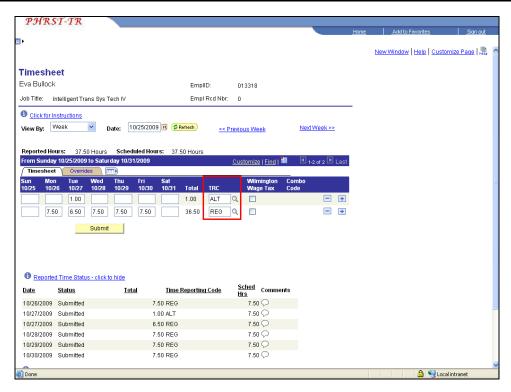
Step	Action
70.	Click the OK button.





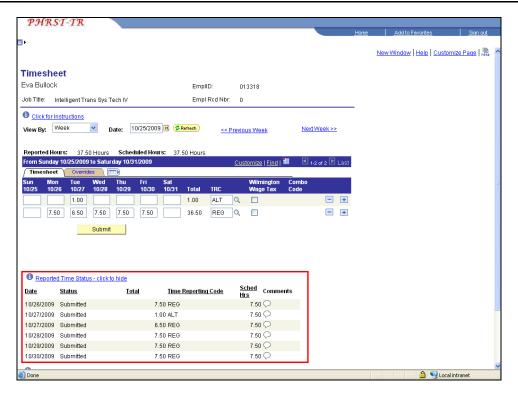
Step	Action
71.	Notice the Reported Hours field now reflects the 37.50 hours just submitted.





Step	Action
72.	After submitting the Timesheet , the TRCs are reordered alphabetically.





Step	Action
73.	The Reported Time Status section is now populated.





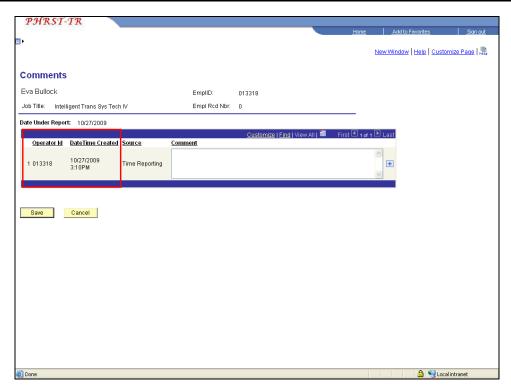
Step	Action
74.	Once time is submitted, a Comments bubble displays beside each row of reported time.
	Note: Comments are associated with a date, not the TRC or Hours. If entering two different TRCs on a single date, two rows of reported time appear for that date.
	If entering a comment on one of the rows, both rows will reflect the same comment.





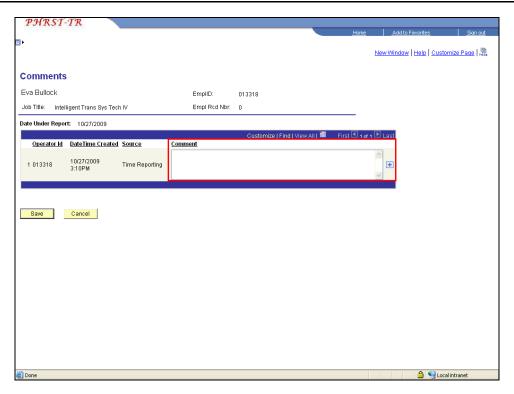
Step	Action
75.	Click the Comments button.





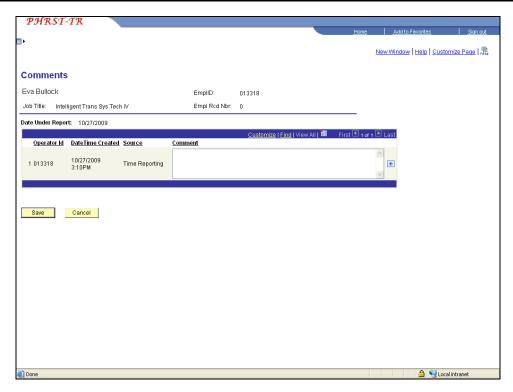
Step	Action
76.	The Operator Id and Date Time Created information are captured for reference.





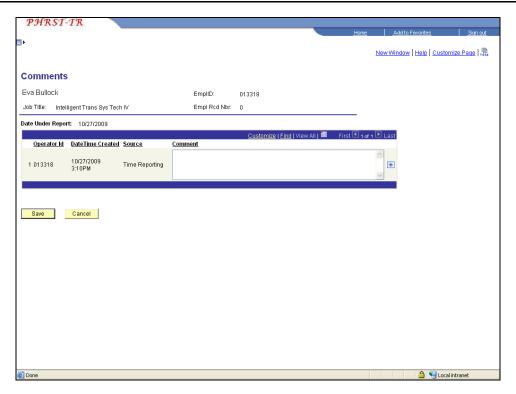
Step	Action
77.	The Comment field holds up to 250 characters.





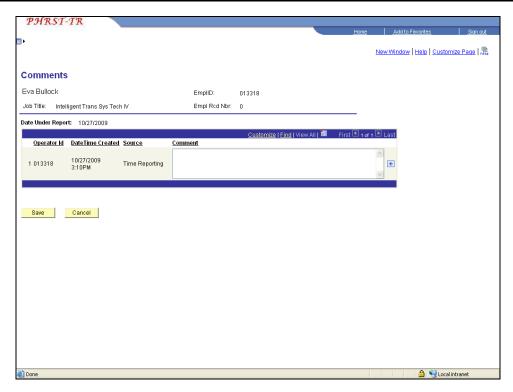
Step	Action
78.	To enter additional text for the same date, click the Plus [+] sign.





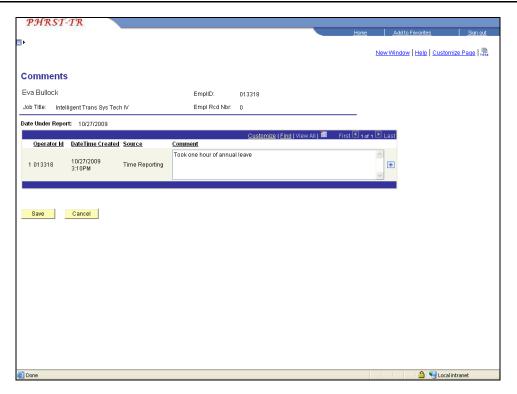
Step	Action
79.	Click in the Comment field.





Step	Action
80.	Enter the desired information into the Comment field. Enter " Took one hour of
	annual leave".





Step	Action
81.	Click the Save button.





Step	Action
82.	When saving a Comment, a message displays asking "Are you sure you want to save the Comment(s) entered?"
	IMPORTANT: After saving a Comment, it cannot be changed or deleted.





Step	Action
83.	Click the OK button.





Step	Action
84.	Once saved, the Comments bubble contains lines indicating that a comment exists. Remember, since there were two different TRCs entered for a single date, there are two rows of Reported Time for that date and both rows reflect the same comment.





Step	Action
85.	If all Reported Time is deleted on the date the Comment was entered, the Comment is deleted.
	If entering new time for that date, the Comment originally associated with the date displays again.





Step	Action
86.	Click the scrollbar.





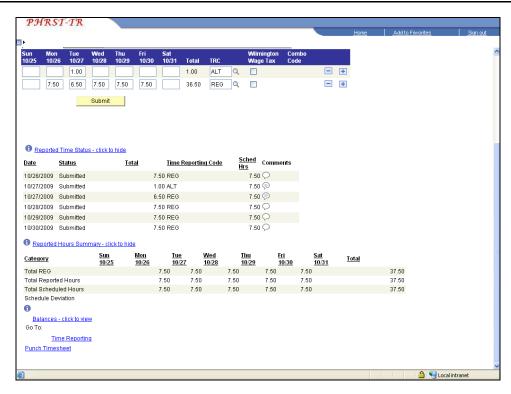
Step	Action
87.	Click the Reported Hours Summary - click to view link.
	Reported Hours Summary - click to view
88.	With the reporting of REG time, the Category of Total REG now displays in the Reported Hours Summary .
	Reported Hours Summary.





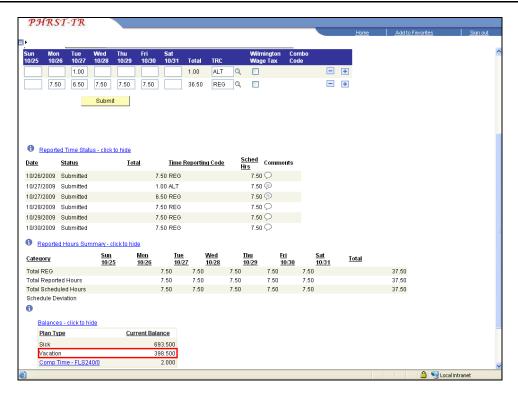
Step	Action
89.	Click the scrollbar.



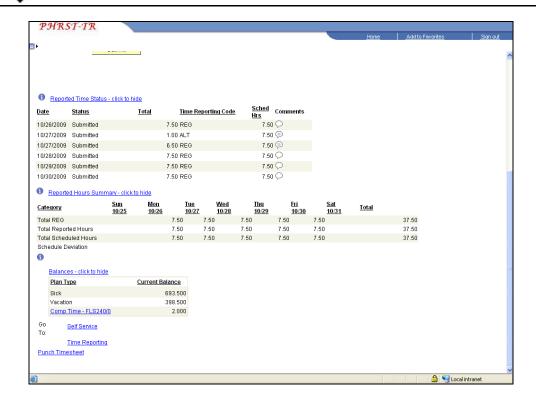


Step	Action
90.	Click the Balances - click to view link.
	Balances - click to view





Step	Action
91.	Notice the Vacation balance value has updated to reflect the 1 hour of ALT submitted on the Timesheet.



Step	Action
92.	Congratulations! You now know how to:
	 Navigate to the Timesheet page Enter time on the Timesheet View Leave Balance information End of Procedure.

Exception Icon

PHRST End User Training v8.9 Exception Icon

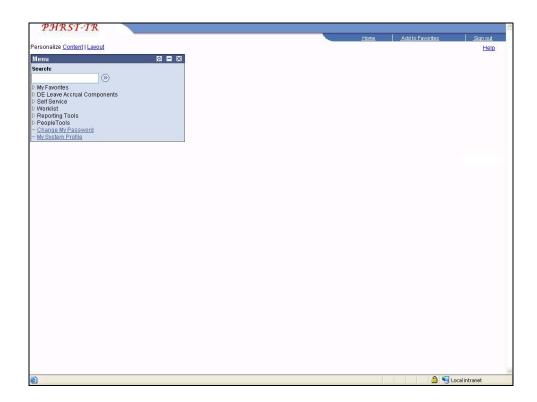
Procedure

By the end of this topic, you will be able to:

- View the Exception Icon

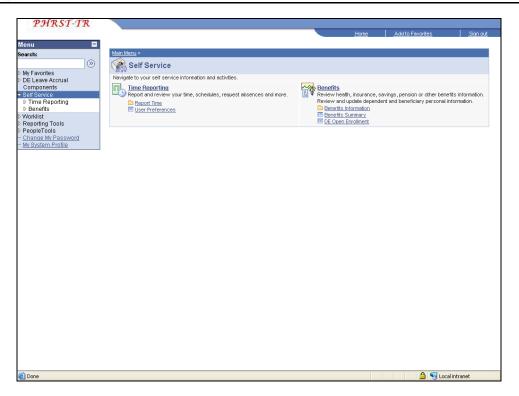


Approximate time to complete topic: 1 minute



Step	Action
1.	Click the Self Service link.
	▷ Self Service





Step	Action
2.	Click the Time Reporting link.
	D Time Reporting
3.	Click the Report Time link.
	▶ Report Time
4.	Click the Timesheet link.
	Timesheet

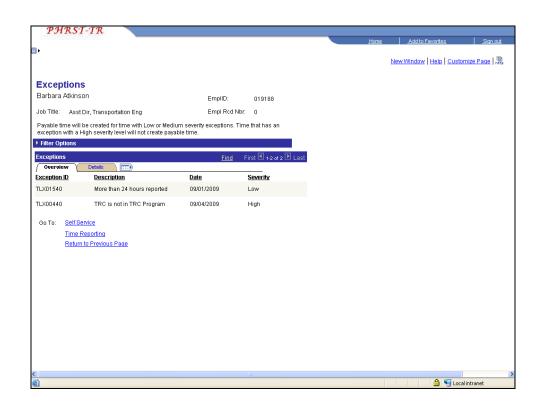




Step	Action
5.	Click the Collapse Menu button.
6.	Click in the Date field.
	12/13/2009
7.	
	Enter the desired information into the Date field. Enter a valid value e.g. "083009".
8.	Click the Refresh Timesheet button.
	⊘ Refresh
9.	When Time reported does not comply with TL Rules, an Exception Icon is displayed. Timekeepers are responsible for monitoring Exception conditions.



Step	Action
10.	In this example, the employee reported more than 24 hours of REG in one day and used the T12H TRC that was not in their TRC program.
	The Exception Icon identifies the date the exception occurred and appears under the Reported Time Status Link.
	Click the Exception button.



Step	Action
11.	This is a view-only page that provides the description of the exception.
	Click the Return to Previous Page link. Return to Previous Page



Step	Action
12.	Congratulations! You are now able to:
	- View the Exception Icon End of Procedure.

User Preferences

PHRST End User Training v8.9 User Preferences

Procedure

By the end of this topic, you will be able to:

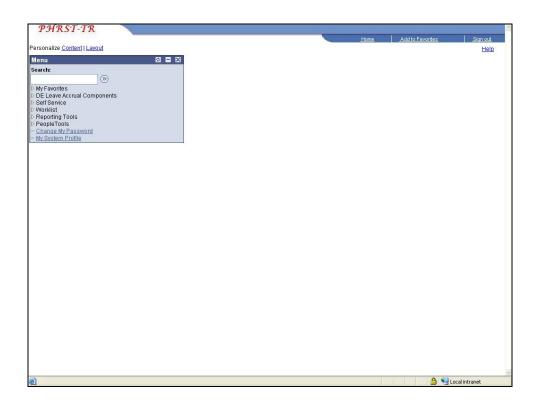
- Navigate to the **Time Reporting Preferences** page.
- Understand the different types of User Preferences options.

Approximate time to complete topic: 4 minutes



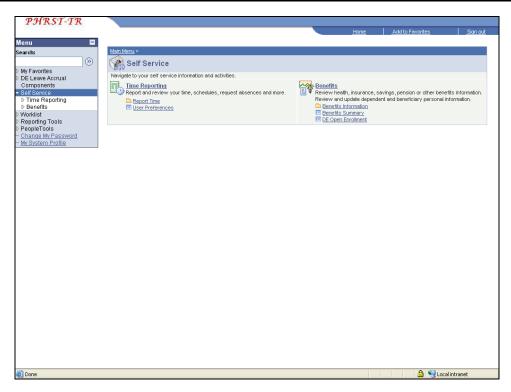


Step	Action
1.	There are no preferences currently set for this employee. The next steps demonstrate how to set up User Preferences.
	Note: Preferences that are set and saved override any defaults.



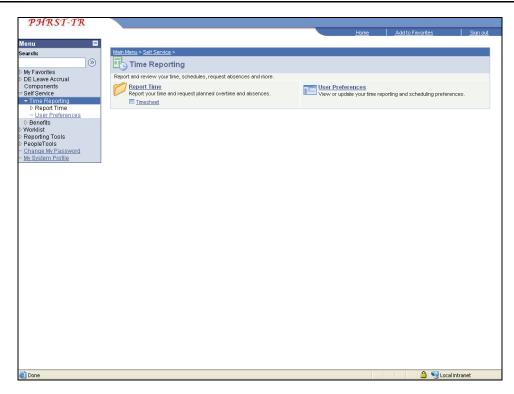
Step	Action
2.	Click the Self Service link.
	D Self Service





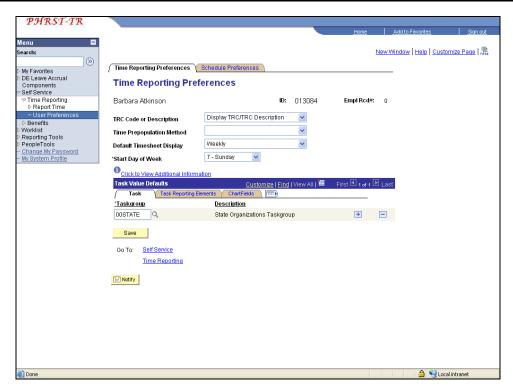
Step	Action
3.	Click the Time Reporting link.
	D Time Reporting





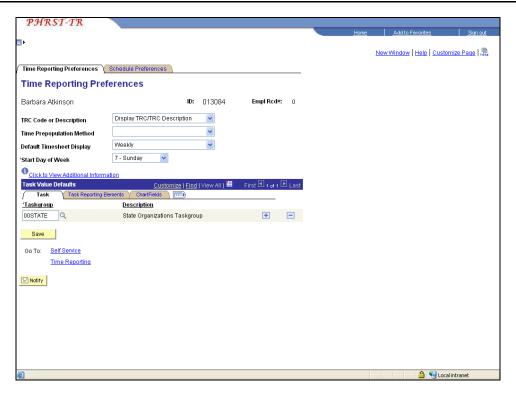
Step	Action
4.	Click the User Preferences link.
	<u>User Preferences</u>





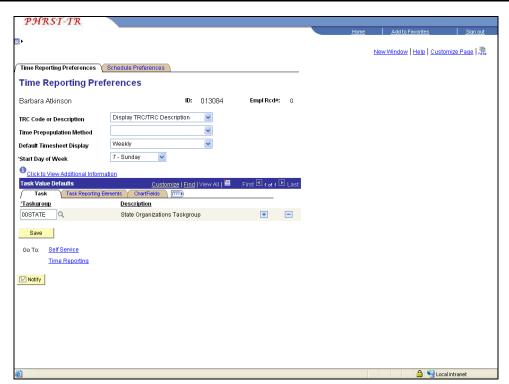
Step	Action
5.	Click the Collapse Menu button.





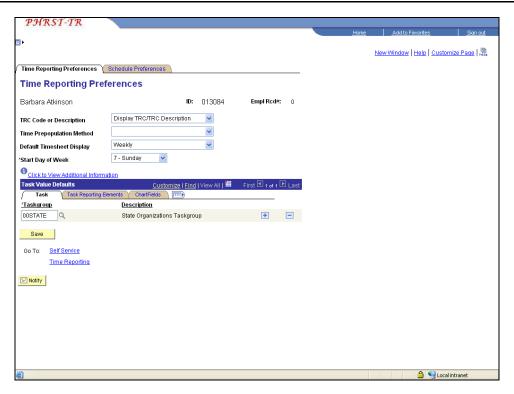
Step	Action
6.	The Time Reporting Preferences page allows Users to set Time Reporting
	Preferences to prepopulate the Timesheet with TRCs and Combo Codes.





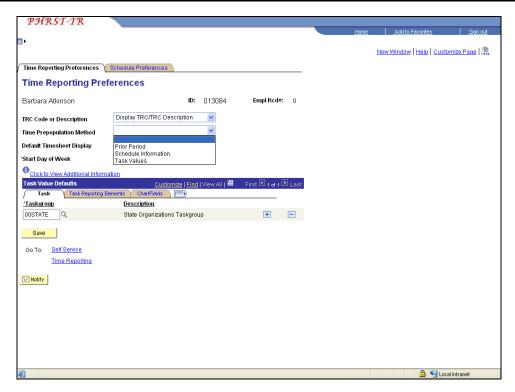
Step	Action
7.	The TRC Code or Description field is not in use by the State of Delaware.





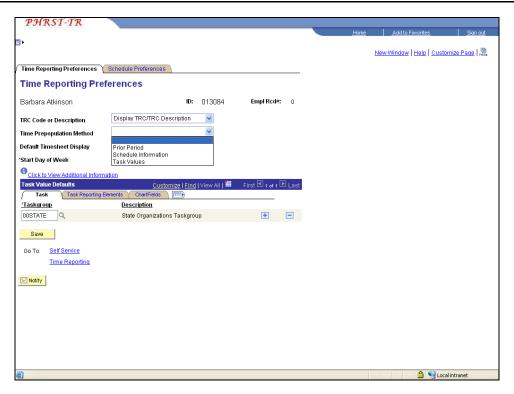
Step	Action
8.	Click the Time Prepopulation Method list.





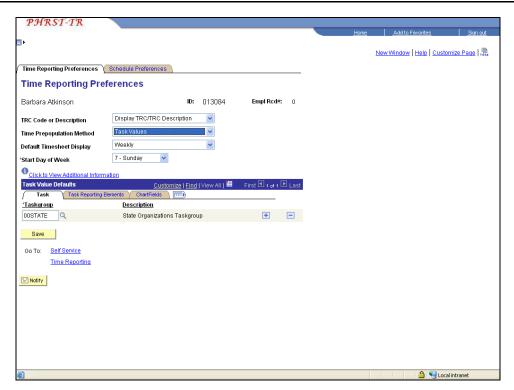
Step	Action
9.	The three options for this field are:
	Prior Period - Not in use by the State of Delaware.
	Schedule Information - The employee's scheduled hours will prepopulate on the Timesheet.
	Task Values - The Task Value Defaults section becomes active to enter TRCs and Combo Codes to populate the Timesheet.





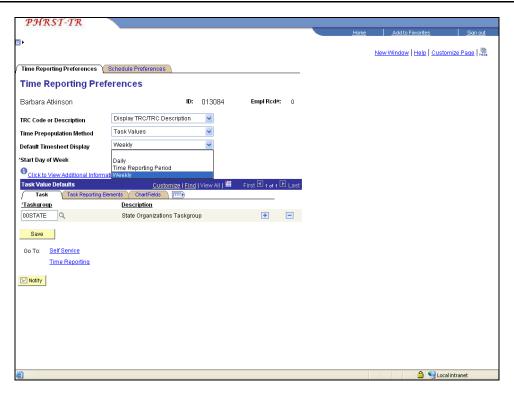
Step	Action
10.	Click the Task Values list item.
	Task Values





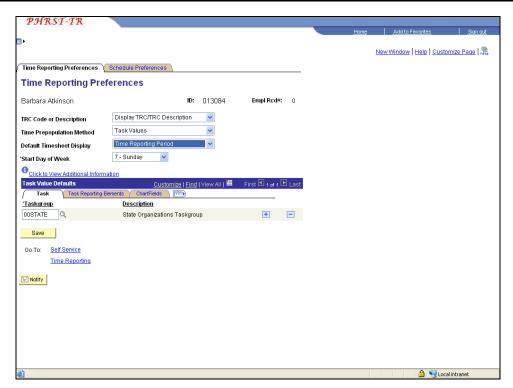
Step	Action
11.	Click the Default Timesheet Display list.
	Weekly





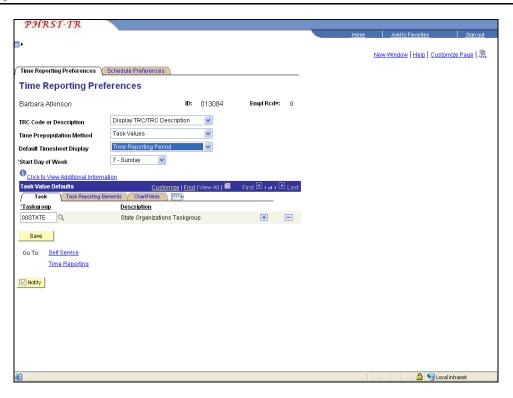
Step	Action
12.	Click the Time Reporting Period list item.
	Time Reporting Period





Step	Action
13.	The Default Timesheet Display field overrides any value previously entered in
	the View By field on the Timesheet.





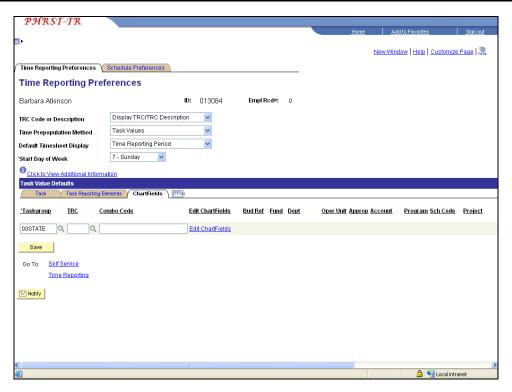
Step	Action
14.	The Start Day of Week field defaults to 7 - Sunday.
	Note: Do not change this default value.
15.	The Task tab displays the Taskgroup and Taskgroup Description.
	Note: Do not change this field.
16.	The Task Reporting Elements tab is not in use by the State of Delaware.





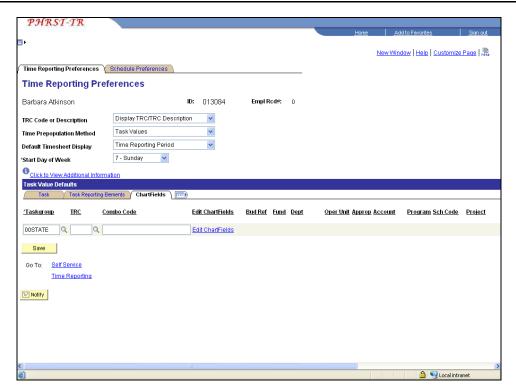
Step	Action
17.	Click the ChartFields tab.
	ChartFields





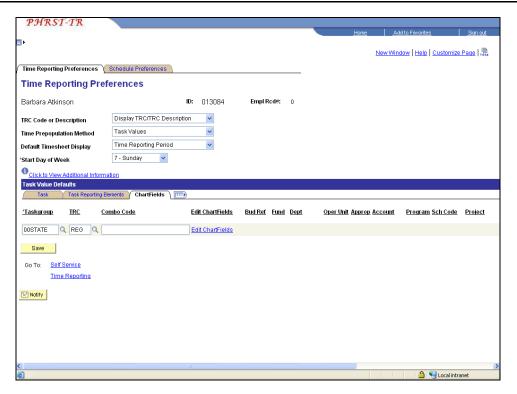
Step	Action
18.	Click in the TRC field.





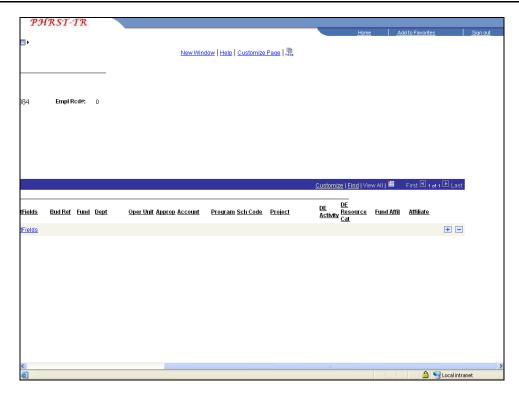
Step	Action
19.	Enter the desired information into the TRC field.
	Enter "REG".





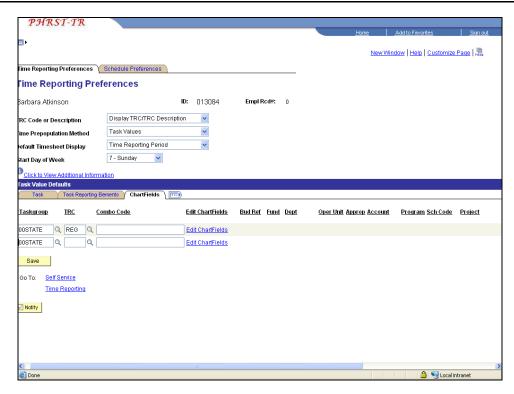
Step	Action
20.	Click the scrollbar.





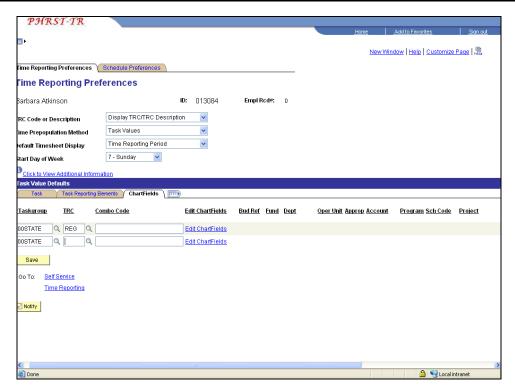
Step	Action
21.	Click the Add a new row button.
	+





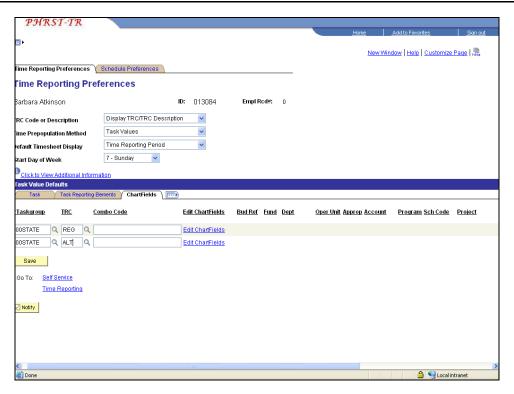
Step	Action
22.	Click in the TRC field.





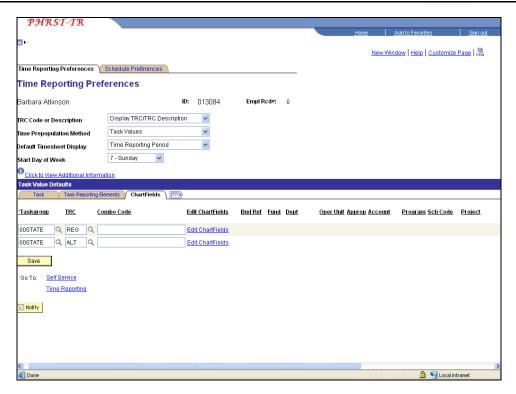
Step	Action
23.	Enter the desired information into the TRC field.
	Enter "ALT".





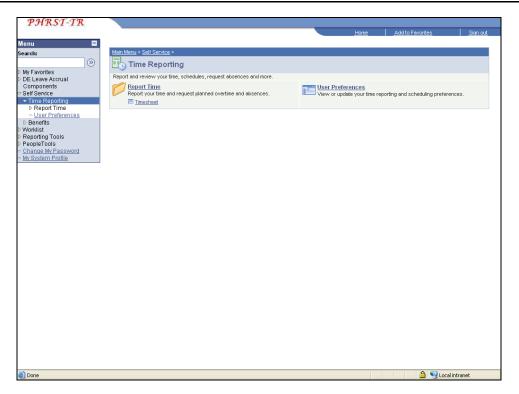
Step	Action
24.	Click the Save button. Save





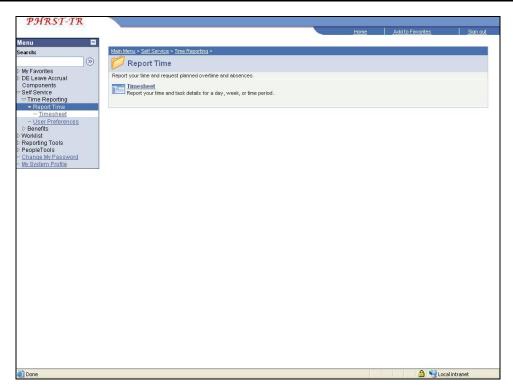
Step	Action
25.	Click the Time Reporting link.
	Time Reporting





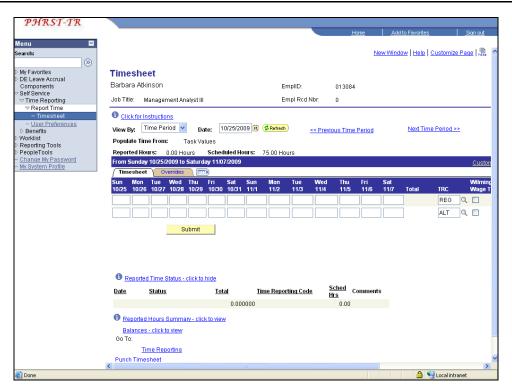
Step	Action
26.	Click the Report Time link.
	D Report Time





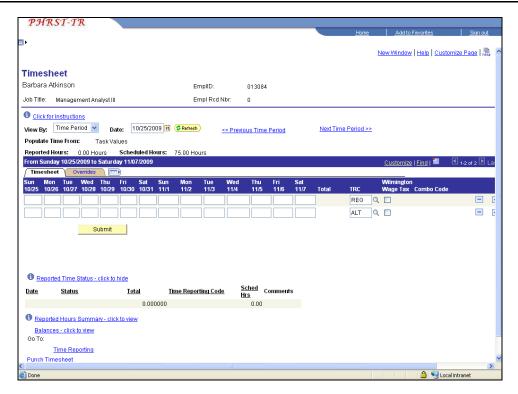
Step	Action
27.	Click the Timesheet link.
	Timesheet





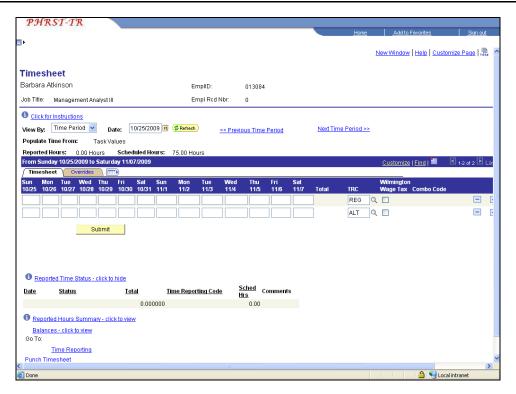
Step	Action
28.	Click the Collapse Menu button.





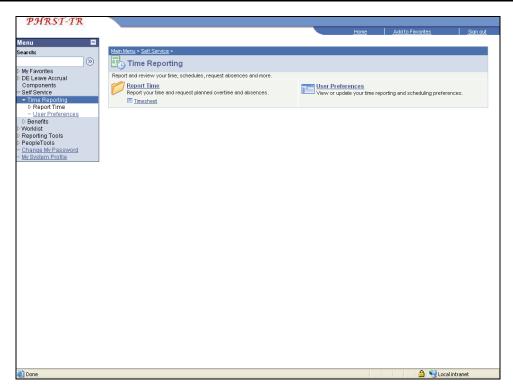
Step	Action
29.	Notice the Timesheet now displays the full time reporting period (two weeks)
	instead of the default 'Week' and the TRCs are prepopulated.





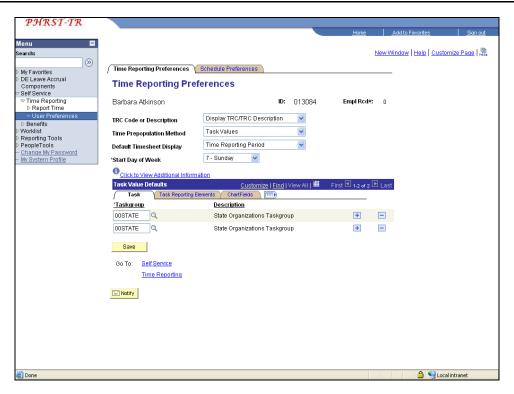
Step	Action
30.	Another Time Prepopulation Method option, Schedule Information , allows you to set Preferences on the Timesheet which will prepopulate the Work Schedule.
	Click the Time Reporting link.





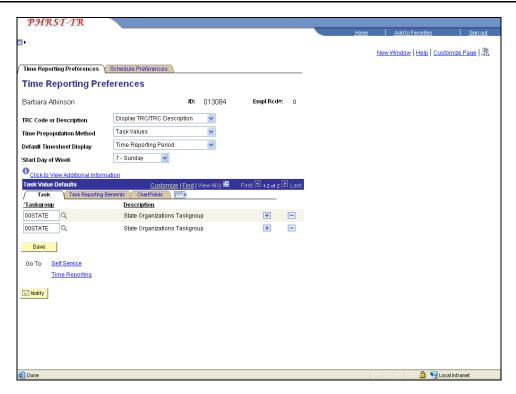
Step	Action
31.	Click the User Preferences link.
	<u>User Preferences</u>





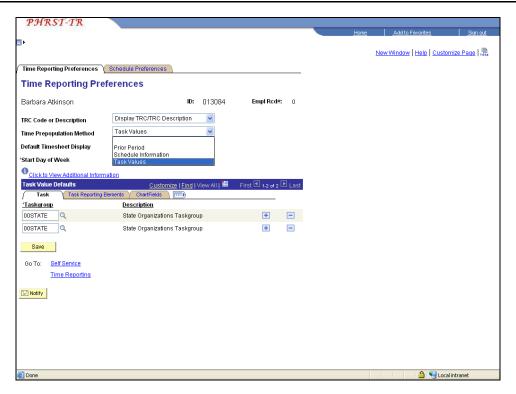
Step	Action
32.	Click the Collapse Menu button.





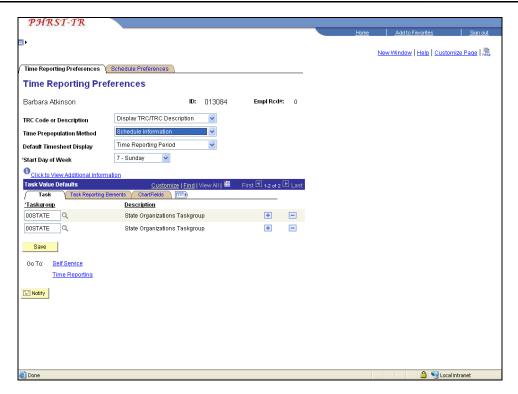
Step	Action
33.	Click the Time Prepopulation Method list.
	Task Values 🔻





Step	Action
34.	Click the Schedule Information list item.
	Schedule Information





Step	Action
35.	Click the Save button.





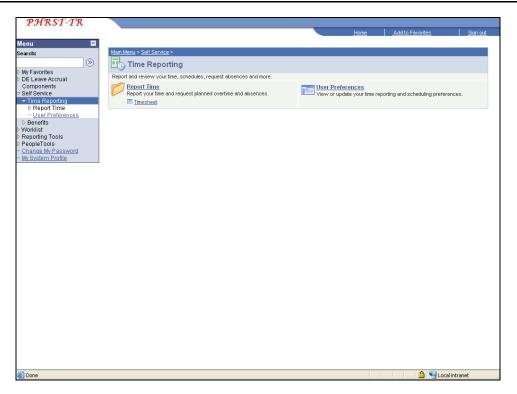
Step	Action
36.	This Warning Message always appears when the Time Prepopulation Method is changed and requires no action. Click the OK button.





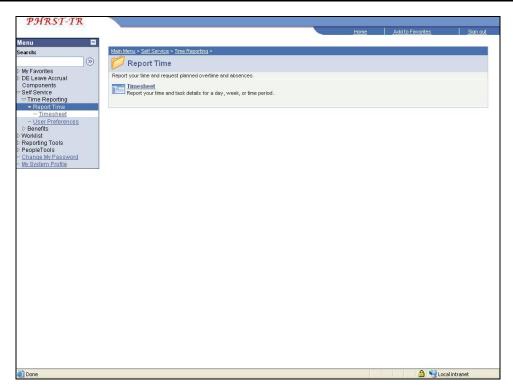
Step	Action
37.	Click the Time Reporting link.
	Time Reporting





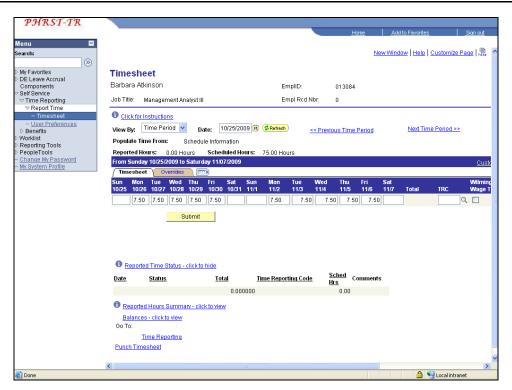
Step	Action
38.	Click the Report Time link.
	D Report Time





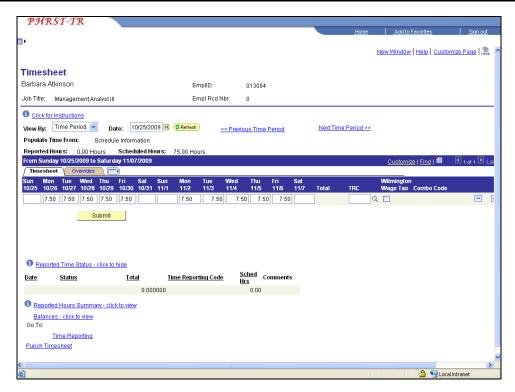
Step	Action
39.	Click the Timesheet link.
	Timesheet





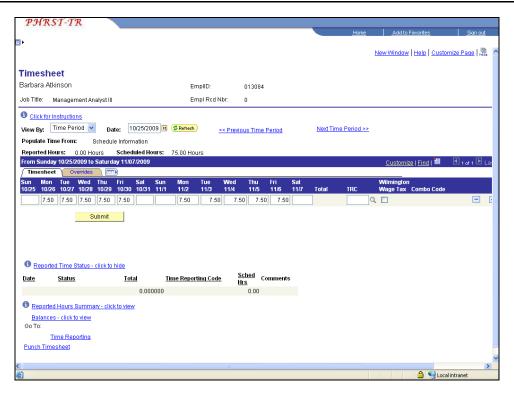
Step	Action
40.	Click the Collapse Menu button.





Step	Action
41.	When the Time Prepopulation Method of Schedule Information is used, the Work Schedule is prepopulated and TRCs are not populated.
	If exceptions are reported on the Timesheet , the existing Scheduled Hours must be deleted or changed.





Step	Action
42.	Congratulations! You are now able to:
	 Navigate to the User Preferences page Apply user preferences to the Timesheet End of Procedure.

Override and Append

PHRST End User Training v8.9 Override and Append

Procedure

By the end of this topic, you will be able to:

- Search for a specific Combination Code by entering related ChartField details
- Create a Combination Code

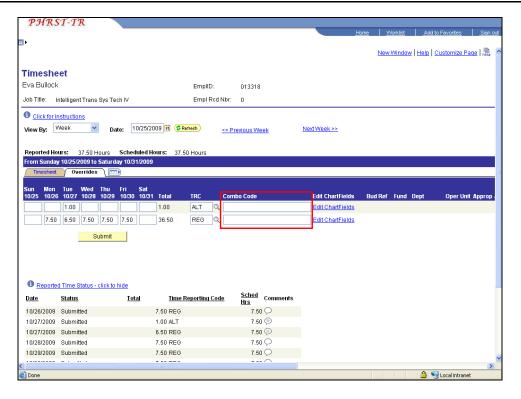
Approximate time to complete topic: 4 minutes





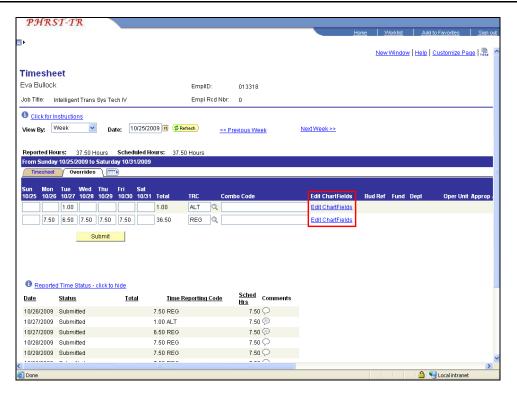
Step	Action
1.	Click the Overrides tab.
	Overrides





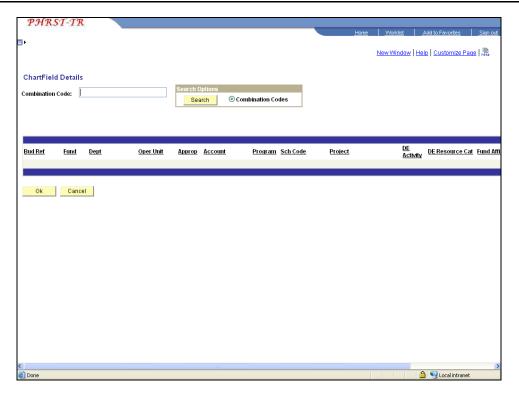
Step	Action
2.	Enter known Combo Codes directly into this field. Security ensures that Combo Codes used are valid for the Organization. If an invalid Combo Code is entered, an on-line error message displays not allowing the submission of the reported time.





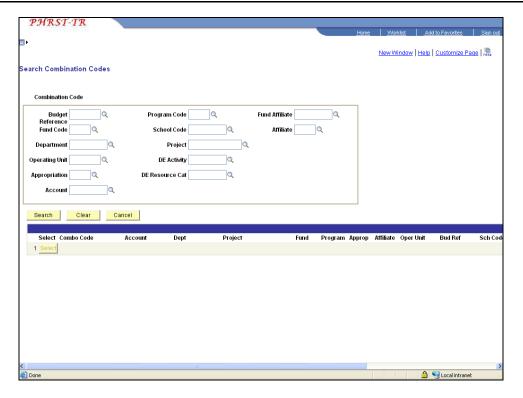
Step	Action
3.	If the Combo Code is unknown, select the Edit ChartFields link.
	Click the Edit ChartFields link. Edit ChartFields





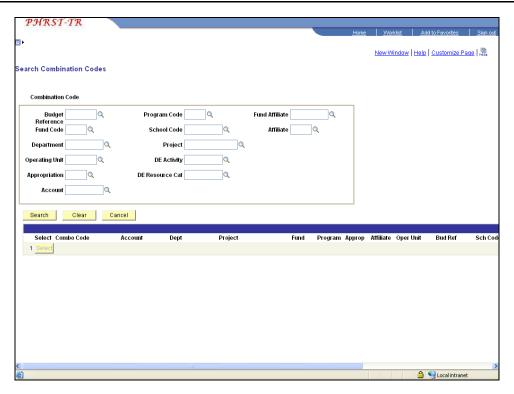
Step	Action
4.	Clicking on the Edit ChartFields link allows searching for the appropriate Combination Code by entering various ChartField data elements.
	Click the Search button. Search





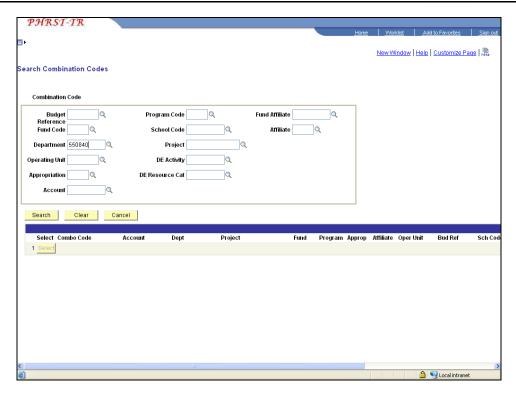
Step	Action
5.	Enter as much ChartField detail as possible to reduce the number of rows returned on a search.
	Enter values, or select by clicking the Lookup button for the field.
	If this does not return the desired ChartField string, eliminate non-core ChartField (s) from the search criteria and click the Search button again.
	Click in the Department field.





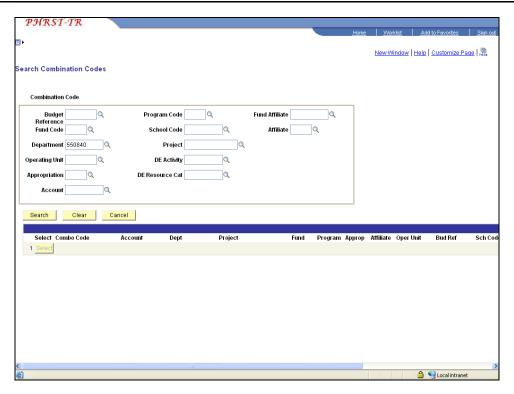
Step	Action
6.	Enter the desired information into the Department field. Enter "550840".





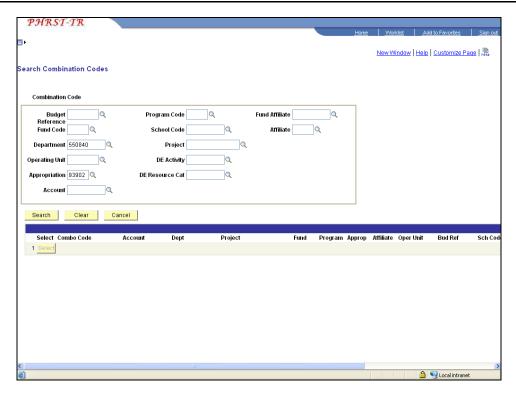
Step	Action
7.	Click in the Appropriation field.





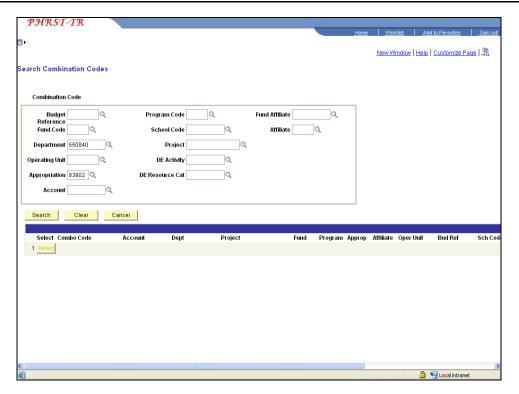
Step	Action
8.	Enter the desired information into the Appropriation field. Enter "93902".





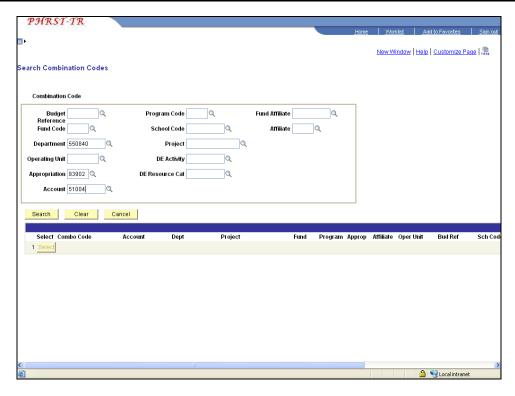
Step	Action
9.	Click in the Account field.





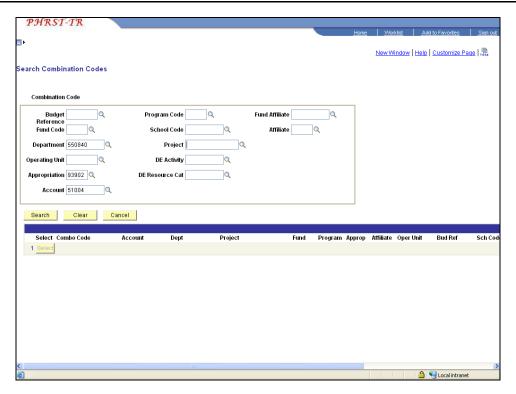
Step	Action
10.	Enter the desired information into the Account field. Enter "51004".





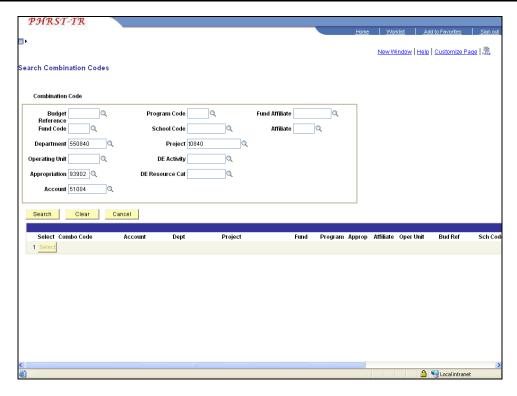
Step	Action
11.	Click in the Project field.





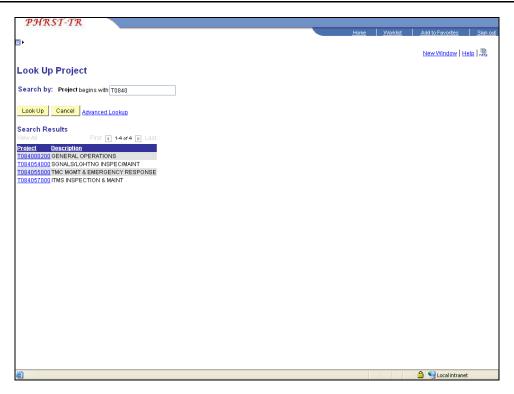
Step	Action
12.	Enter the desired information into the Project field. Enter "t0840".





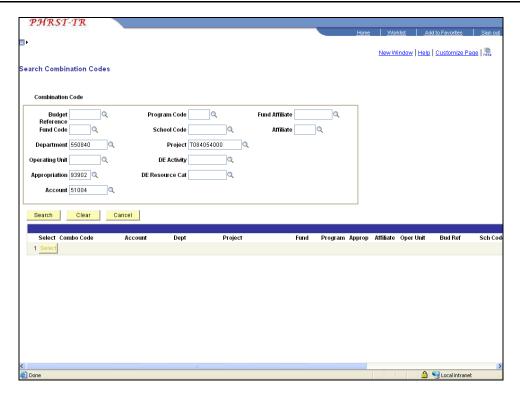
Step	Action
13.	Click the Look up Project button.





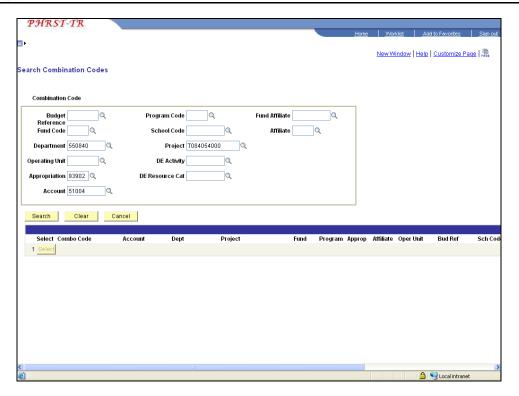
Step	Action
14.	Click the T084054000 link.
	T084054000





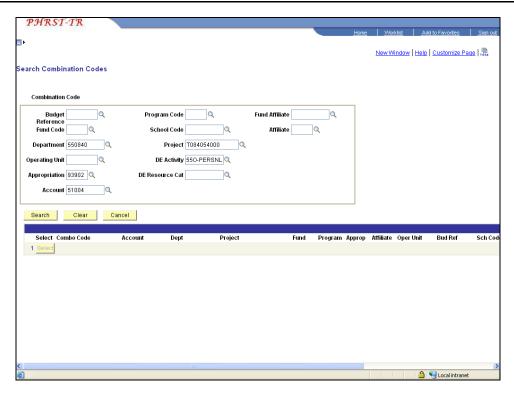
Step	Action
15.	Click in the DE Activity field.





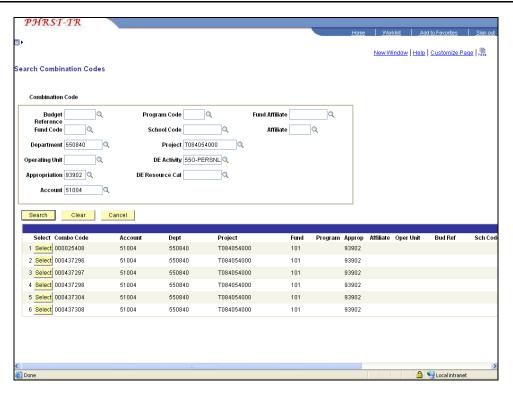
Step	Action
16.	Enter the desired information into the DE Activity field. Enter "550-PERSNL".





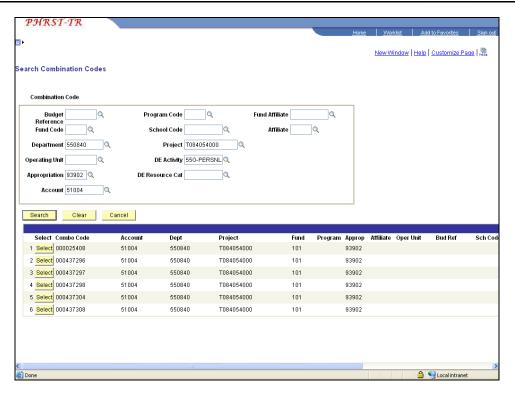
Step	Action
17.	Click the Search button. Search





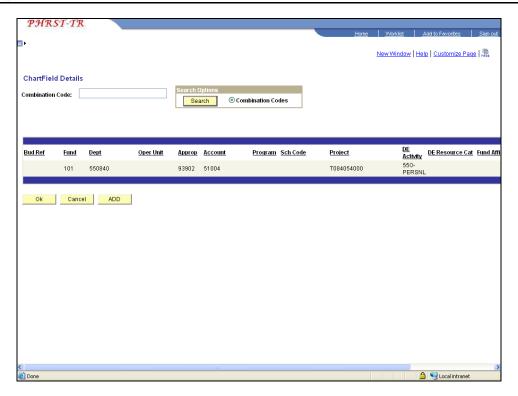
Step	Action
18.	The Search returns all Combo Codes containing the populated ChartField values. This example returns six Combo Codes .





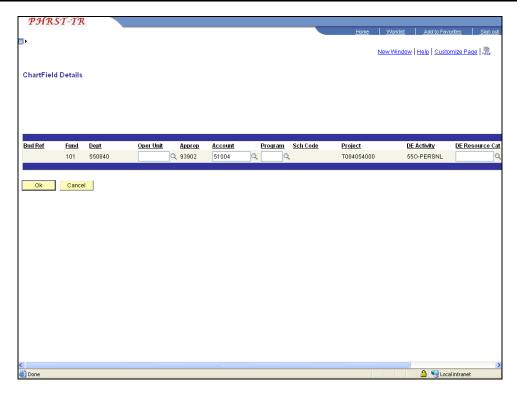
Step	Action
19.	Click the Select button.





Step	Action
20.	Click the Ok button only if the Chartfield string contains all of the desired ChartField details.
	If additional ChartField (s) need appending in the string, select the ADD button.
	Click the ADD button.





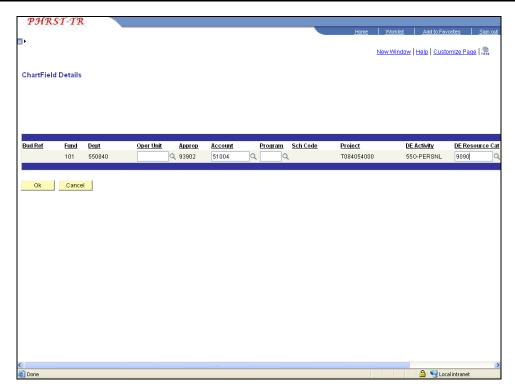
Step	Action
21.	Click in the DE Resource Cat field.





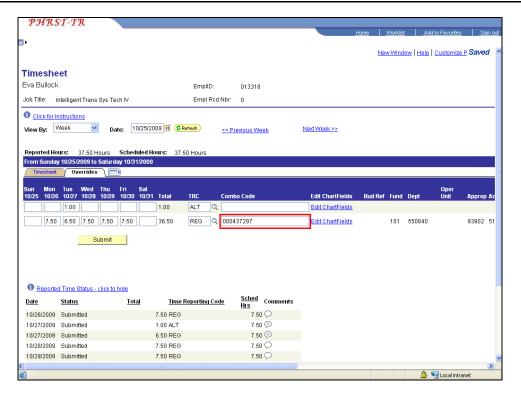
Step	Action
22.	Enter the desired information into the DE Resource Cat field. Enter a valid value e.g. "9090".





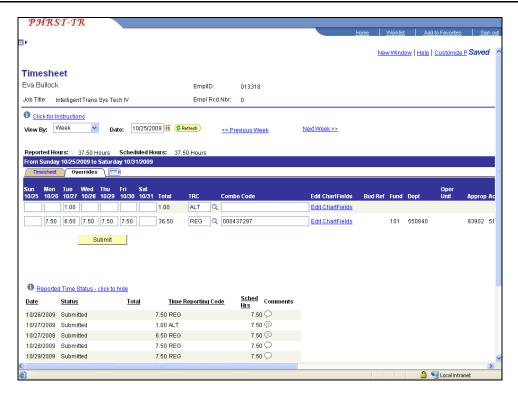
Step	Action
23.	Click the Ok button.





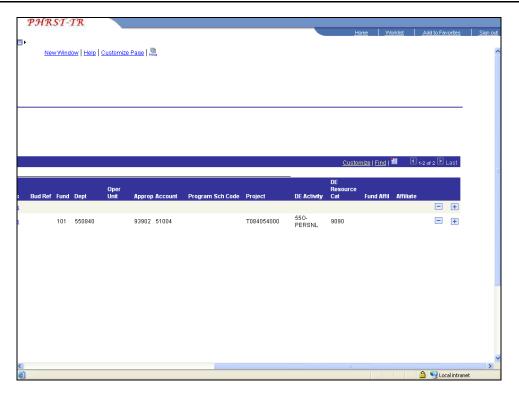
Step	Action
24.	The Combo Code of 000437297 populates the Combo Code field. This code is the result of the data entry on the ChartField Details page.
	the result of the data entry on the Chartrield Details page.





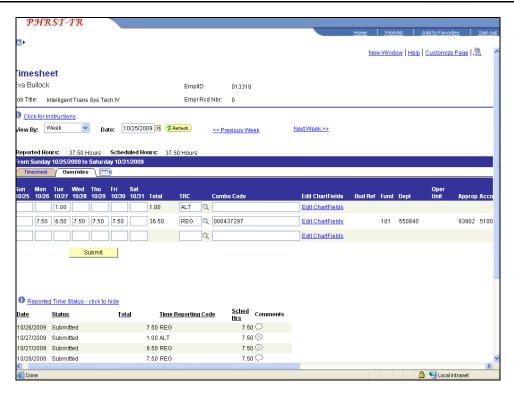
Step	Action
25.	Click the scrollbar.





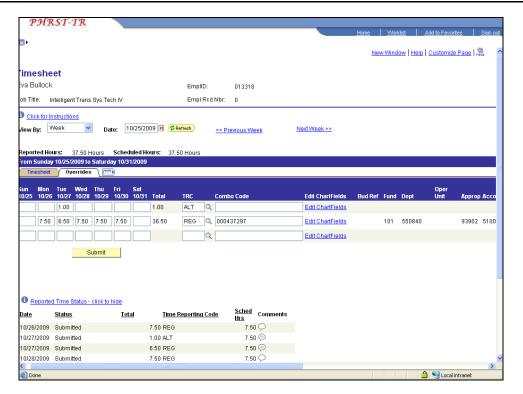
Step	Action
26.	Click the Add a new row button.
	+





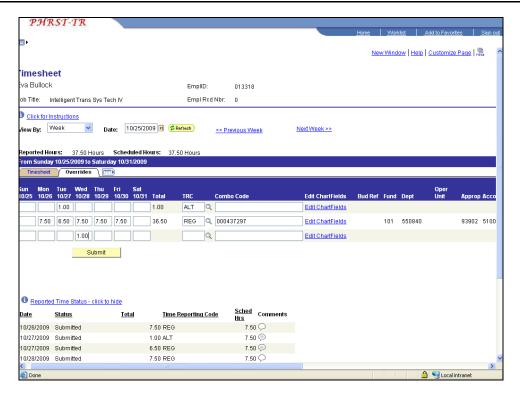
Step	Action
27.	Click in the Wed 10/28 field.





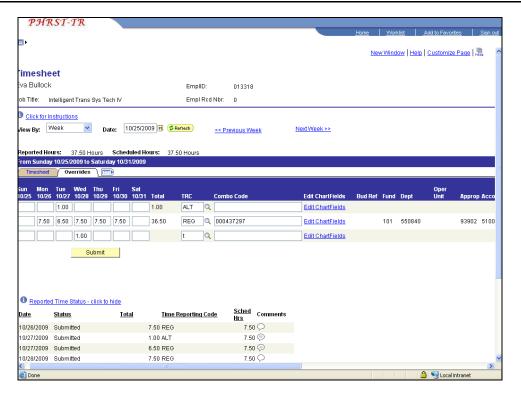
Step	Action
28.	Enter the desired information into the Wed 10/28 field. Enter "1.00".





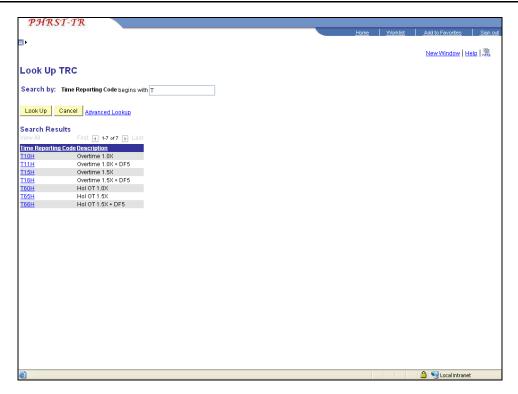
Step	Action
29.	
	Enter the desired information into the TRC field. Enter a valid value e.g. "t".





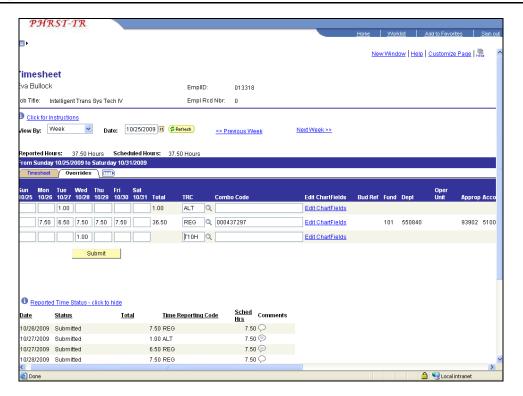
Step	Action
30.	Click the Look up TRC button.
	<u> </u>





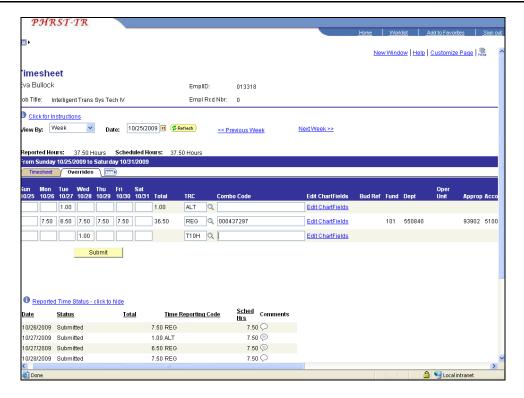
Step	Action
31.	Click the T 10 H link.





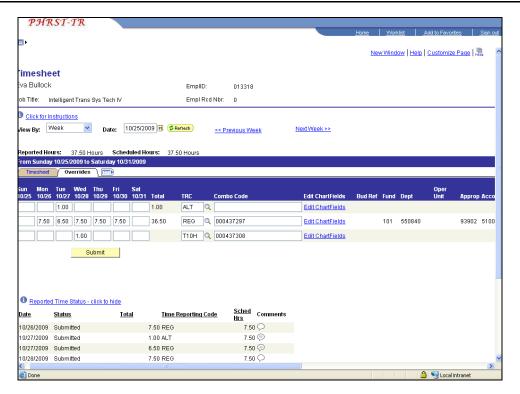
Step	Action
32.	Click in the Combo Code field.





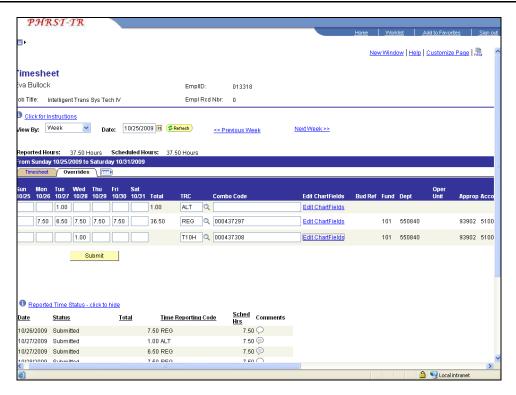
Step	Action
33.	Enter the desired information into the Combo Code field. Enter a valid value e.g. "000437308".





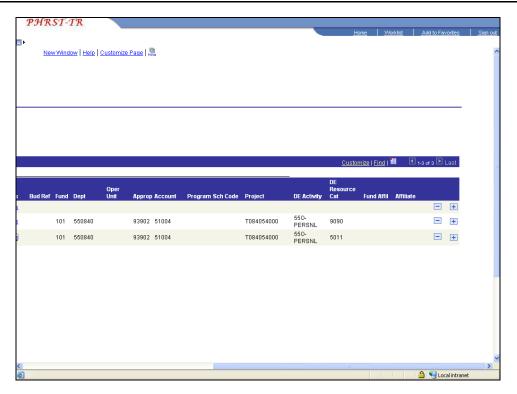
Step	Action
34.	
	Press [Tab].





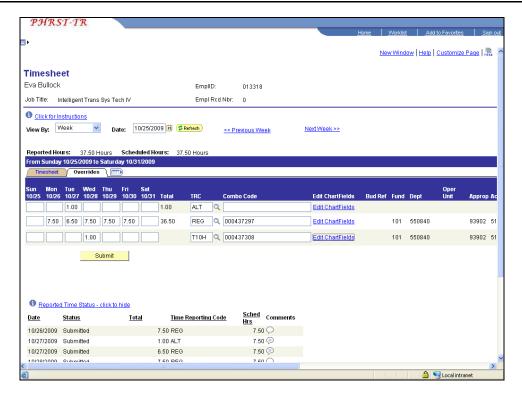
Step	Action
35.	View the additional columns on this page using the Horizontal Scrollbar .
	Click the scrollbar.





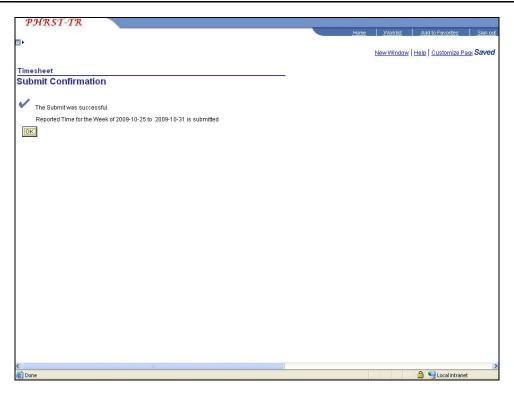
Step	Action
36.	Click the scrollbar.





Step	Action
37.	Click the Submit button. Submit





Step	Action
38.	Click the OK button.





Step	Action
39.	Congratulations! You are now able to:
	 Search for a specific Combination Code by entering related ChartField details Create a Combination Code End of Procedure.

Viewing Leave Balances

View Sick, Annual, and Comp Time Balances

PHRST End User Training v8.9 View Sick, Annual and Comp Time Balance

Procedure

By the end of this topic, you will know how to:

- Navigate to the View Leave Balances page
- View Leave Balance information

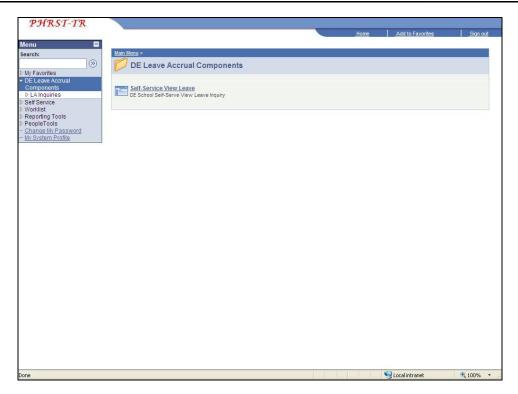


Approximate time to complete topic: 3 minutes



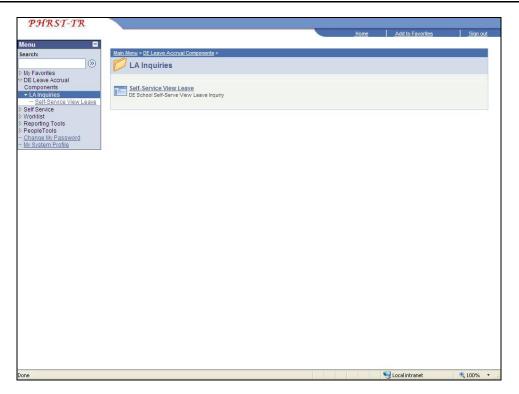
Step	Action
1.	Click the DE Leave Accrual Components link.
	DE Leave Accrual Components





Step	Action
2.	Click the LA Inquiries link.
	D LA Inquiries





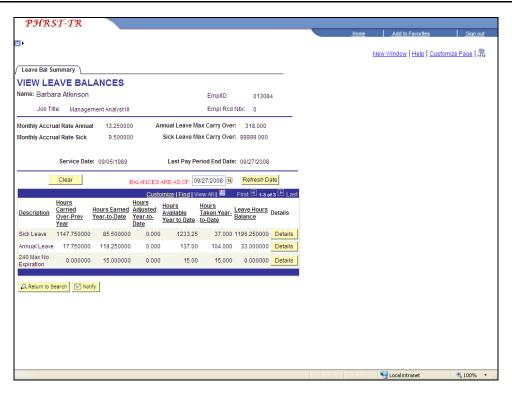
Step	Action
3.	Click the Self- Service View Leave link.
	- Self-Service View Leave





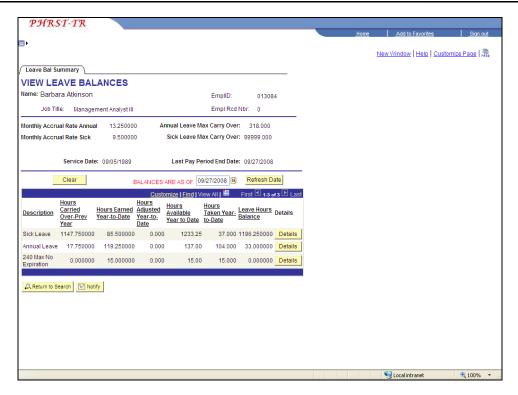
Step	Action
4.	Click the Collapse Menu button.





Step	Action
5.	Employees can review balances for their Leave Plans.
	The View Leave Balances page lists balances as of pay period end dates for Sick Leave, Annual Leave, and Compensatory Time.





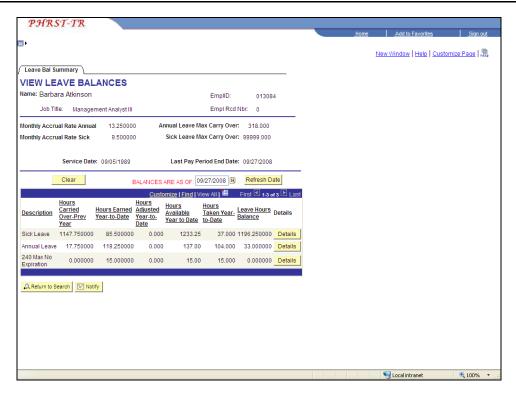
Step	Action
6.	In most cases, the employee's Service Date is the basis for the value displayed in the Monthly Accrual Rate Annual .





Step	Action
7.	To review historical balances, change the date in the BALANCES ARE AS OF field and click the Refresh Date button.
	Note : Although this field accepts any date, PHRST automatically select the closest confirmed payroll end date when clicking the Refresh Date button.





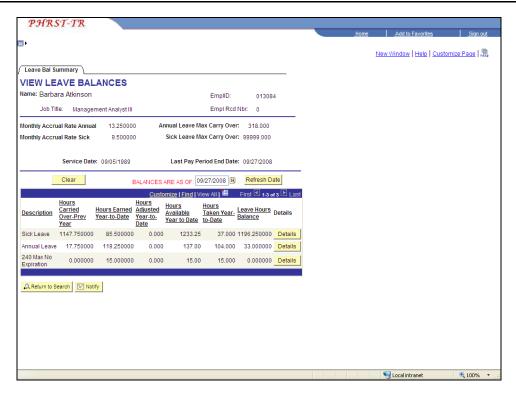
Step	Action
8.	The Hours Carried Over Previous Year remain the same value for the entire
	calendar year.





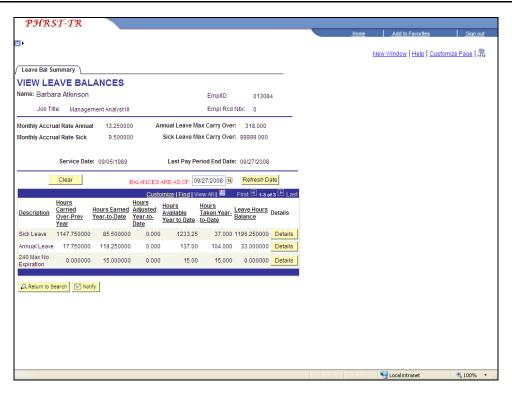
Step	Action
9.	The Hours Earned Year-to-Date displays the accrued time from the beginning of
	the leave plan year.





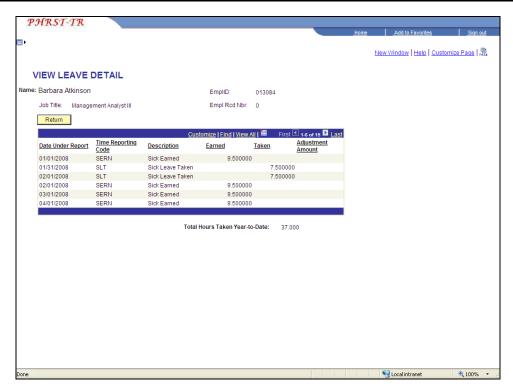
Step	Action
10.	The Leave Hours Balance displays the current balance.





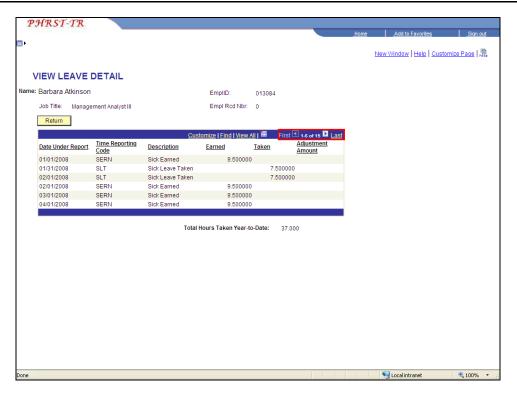
Step	Action
11.	To review specific details of any leave balance earned or taken year-to-date, click on the corresponding Details button.
	In this example, view the Sick leave balance detail.
	Click the Details button. Details





Step	Action
12.	The View Leave Detail page lists the Time Reporting Codes for leave hours
	earned, taken and/or adjusted.





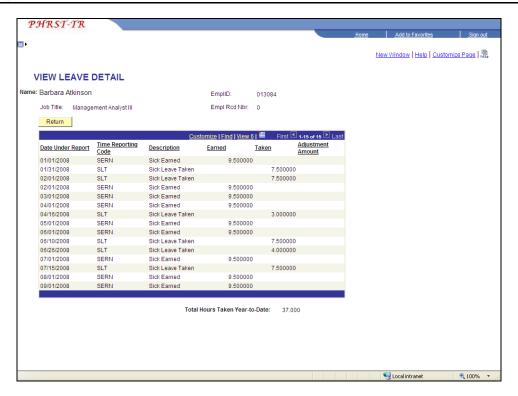
Step	Action
13.	This view is displaying only rows 1 through 6 of 15 available rows.





Step	Action
14.	Viewing all rows is possible by clicking the View All link.
	Click the View All link. View All





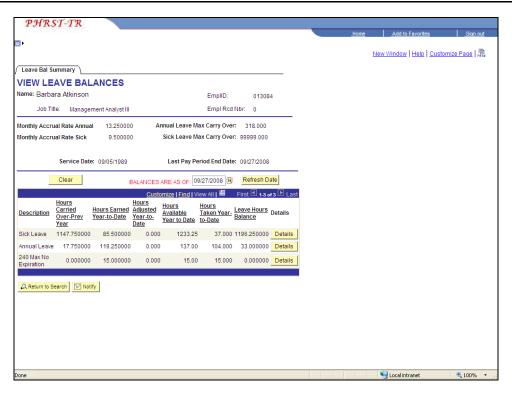
Step	Action
15.	View all the leave taken by this employee in 2008.





Step	Action
16.	Click the Return button.
	Return





Step	Action
17.	Congratulations! You are now able to:
	 Navigate to the View Leave Balances page View Leave Balance information End of Procedure.